

**MASTER AGREEMENT #102924****CATEGORY: Fleet Management Technologies with Related Software Solutions****SUPPLIER: Education Logistics, Inc.**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Education Logistics, Inc., 3000 Palmer Street, Missoula, MT 59808 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:  
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on April 23, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #102924 to Participating Entities. In Scope solutions include:
- a. Fleet management information systems;
  - b. Fleet technology related hardware solutions;
  - c. Related software solutions;
  - d. Fleet telematics;
  - e. Geofencing solutions;
  - f. Motor pool and fleet sharing solutions services;
  - g. Integrated video solutions; and,
  - h. Emissions, Green House Gas (GHG), or Low Carbon Fuel Standard (LCFS) tracking, reporting, and management.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.
- 13) Supplier Representations:**

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
  - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
  - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.
- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcwell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier

certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.

xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.

xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.



xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

## **Article 2: Sourcewell and Supplier Obligations**

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
  - Identify the applicable Sourcewell Agreement number;
  - Clearly specify the requested change;
  - Provide sufficient detail to justify the requested change;
  - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
  - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
  - Maintenance and management of this Agreement;
  - Timely response to all Sourcewell and Participating Entity inquiries; and
  - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms,

administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.

- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or



remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

19) **Grant of License.**

a) **During the term of this Agreement:**

i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

c) **Use; Quality Control.**

i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and

Participating Entity to negotiate this term to within any transaction documents.

- 21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
    - \$1,500,000 each occurrence Bodily Injury and Property Damage
    - \$1,500,000 Personal and Advertising Injury
    - \$2,000,000 aggregate for products liability-completed operations
    - \$2,000,000 general aggregate
  - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
  - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
  - d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

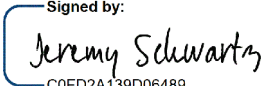
### **Article 3: Supplier Obligations to Participating Entities**

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

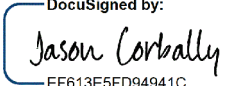
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

Signed by:  
  
By: C0FD2A139D06489...  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 4/22/2025 | 4:17 PM CDT

Education Logistics, Inc.

DocuSigned by:  
  
By: EF613E5FD94941C...  
Jason Corbally  
Title: President Education Logistics Inc.  
Date: 4/22/2025 | 3:57 PM CDT

# RFP 102924 - Fleet Management Technologies with Related Software Solutions

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## Vendor Details

Company Name: Education Logistics, LLC

Does your company conduct business under any other name? If yes, please state: EDULOG

Address: 3000 Palmer Street  
Missoula, Montana 59808

Contact: Sara Corbally

Email: scorbally@edulog.com

Phone: 509-981-4533

HST#:

## Submission Details

Created On: Thursday October 03, 2024 13:57:22

Submitted On: Monday October 28, 2024 17:18:23

Submitted By: Carter Young

Email: cyoung@edulog.com

Transaction #: 0da481a6-8086-4d7b-a00d-589789c8bf7b

Submitter's IP Address: 216.14.232.67

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## Specifications

**Table 1: Proposer Identity & Authorized Representatives (Not Scored)**

**General Instructions** (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer's corporate organization affiliation.

Line Item	Question	Response *	
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Education Logistics, Inc.	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y	*
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	Edulog is the trade name for products and services from Education Logistics, Inc. Throughout this submittal "Edulog" will refer to the products and services of Education Logistics, Inc.	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	YKZZM1TG7LW6 (SAM Unique Identifier)	*
5	Provide your NAICS code applicable to Solutions proposed.	541511 - Custom Computer Programming Services 541512 - Computer Systems Design Services 488490 - Other Support Activities for Road Transportation 611710 - Educational Support Services	
6	Proposer Physical Address:	3000 Palmer Street, Missoula, MT 59808	*
7	Proposer website address (or addresses):	www.edulog.com	*
8	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer):	Jason Cobally President, Education Logistics, Inc. 3000 Palmer Street, Missoula, MT 59808 jcorbally@edulog.com (406) 396-3654	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Carter Young Sales Support Manager, Education Logistics, Inc. 3000 Palmer Street, Missoula, MT 59808 cyoung@edulog.com (406) 728-0893	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	None at this time.	

**Table 2A: Financial Viability and Marketplace Success (50 Points)**

Line Item	Question	Response *	
11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	Edulog (Education Logistics, Inc.) has been serving school district transportation operations longer than any other major software vendor (since 1978), and we continue to strengthen our ties to our long-term clients through the introduction of integrated GPS/AVL and student ridership management technology, new web features, and enhanced consulting and support services. Edulog's strength of experience is also on a personal level. Many Edulog managers have been assisting school districts for more than 20 years, and the entire staff has nearly 700 years of experience with school transportation operations. But we go beyond merely sitting in an office and talking to clients on the phone: many projects have Edulog staff at customer sites for	

weeks at a time, and several of the company's employees have actually been assigned to work side-by-side with client transportation staff for months, and in some cases, years.

Education Logistics, Inc. (Edulog) is owned and directed by its founder, Dr. Hien Nguyen, and today employs or contracts with more than 165 professionals throughout North America, Europe, and Asia.

After completing his M. B.A. and Ph.D. in Mathematics at the Massachusetts Institute of Technology, Dr. Nguyen applied his knowledge to develop the Operations Research (OR) curriculum and program at the University of Montana. During this time, his focus on OR resulted in a consulting project for pupil transportation that developed efficient bus routes and schedules through the creation of a mathematically sound way to optimize the myriad potential alternatives.

These efficiencies produced impressive savings for the districts involved with the project, and after three years of refining the optimization process, Dr. Nguyen introduced the commercial application of optimization to student transportation. In 1978, he founded the first pupil transportation consulting and technology company, Edulog. The new company combined the groundbreaking research into optimization and the application of GIS (Geographic Information System) technology into a computerized system for successful management of school bus routes and schedules.

During the 1980s, as the Edulog system was implemented throughout North America, the system was further expanded to include applications for school attendance boundary planning/ redistricting, statistical forecasting for student enrollments, and enhanced optimization routines. In 1988, Edulog's superior solutions for managing school transportation were further validated when the state of North Carolina awarded Edulog a contract for the first pupil transportation management system to be used by every school district under state control.

With the advent of more powerful PCs in the 1990s, Edulog developed a modernized version of his routing and scheduling and optimization software that ran on Windows-based workstations, and the company increased its client base from 80 school districts in 1989 to more than 650 by 1999. During this time, the company continued to leverage new technology by creating the first web-based software for pupil transportation.

In the years following 2000, Edulog's proven capabilities at optimizing school busing resulted in the company winning competitive RFP contracts from the New York City Department of Education and the Minneapolis Public Schools, thus adding to Edulog's portfolio of the largest school bus operators. It was also during this decade that Edulog began developing applications for the emerging GPS/AVL student transportation market—and created the first integration of GPS/AVL with routing operations management. The result of this effort is the most comprehensive planning and monitoring system for the world's school buses, with the number of clients that having been served by Edulog now exceeding 1,200.

Edulog's current focus is on integrating mobile devices to enhance connectivity and situational awareness between buses and transportation departments. In particular, artificial intelligence developments in the areas of natural language processing and visual/geospatial machine learning are being used to create state-of-the-art data modeling and computation techniques that will solve problems confronting the pupil transportation industry.

The integration of advanced technology with the human experience formed through decades of service represents Edulog's core: no other firm has as broad a range of products for school transportation management (routing and scheduling, GPS, student passenger management, electronic vehicle inspection, driver time and attendance tracking, web, GIS, planning, SaaS (Software as a Service), accounting, fleet maintenance, field trip management) or can offer total solution services that guarantee a client's success. This integration is scalable, flexible, and proven.

Often imitated, never equaled: that's another benchmark of Edulog. We've seen competitors come and go while listening to them compare what they do to what we've already accomplished. While others try to catch up by copying original ideas, Edulog is developing the newest, most powerful, and useful solutions (such as fully integrated bus and student passenger management using GPS/GIS/wireless technology).

#### Core Values:

Edulog's core values are based on listening closely to what a customer wants and needs, creating solutions customized to those wants and needs, and engaging in constant enhancements to innovation, customer service, and safety. We are committed to delivering cost-effective solutions that enhance the efficiency of school transportation operations while ensuring the safety of students and service to the

		<p>wider community. We work hard to make sure that our software and hardware solutions stay on the cutting edge—including school bus GPS tracking, student ridership, and parent communication solutions—which help school districts improve safety and keep money in the classrooms while efficiently transporting students.</p> <p>Business Philosophy: Edulog's business philosophy is focused on intensive problem-solving—including the use of artificial intelligence and advanced mathematical analysis—value to the customer, adaptability, and continuous improvement. We provide scalable and flexible transportation management solutions that are both powerful and easy-to-use, and which meet the diverse needs of school districts, from the smallest to the absolute largest. Our approach emphasizes the importance of data-driven decision-making, empowering clients with tools to reduce operational inefficiencies and improve overall service delivery.</p>	
12	What are your company's expectations in the event of an award?	<p>Education Logistics, Inc. (Edulog) has extensive experience selling cooperative agreements directly to school districts and are confident that we can help districts see the benefit of using a fully vetted, competitively bid cooperative agreement to save potential school district clients not only operational expenses because of the superiority of Edulog's products and services—but also procurement processes time, money, and resources. Edulog knows of several school districts who have used Sourcewell contracts and other clients have mentioned a Sourcewell contract as a potential (and excellent) way for Edulog to quickly gain new business.</p> <p>Edulog also has a large presence at trade shows and professional conferences throughout North America—thus providing us with an excellent opportunity to educate non-members on the benefits of partnering with Sourcewell. In the event of an award, our expectation is that Edulog and Sourcewell leadership and marketing teams would come together to strategically define the framework of our mutually beneficial partnership that will continue to grow in forthcoming years. We would then create and launch multiple marketing/sales campaigns that would include both internal and external press releases, social media posts, publishing a custom landing page on our website, and targeted email blasts to both Sourcewell members and Edulog clients and prospects. In summary, we expect a Sourcewell contract will provide school districts with an exceptionally cost-effective way to obtain the latest and best transportation management solutions on the market.</p>	*
13	<p>Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.</p>	<p>Education Logistics, Inc.'s Financial Position</p> <p>To whom it may concern,</p> <p>I am the company's attorney, and I am writing in response to the request for evidence of financial strength and stability. Since our founding in 1978, Education Logistics has had as its mission working with communities to deliver children to school intelligently, safely, and efficiently, generating millions of dollars of savings and efficiencies for our clients.</p> <p>We have operated as a viable and self-funded business for over forty years. We have consistently adhered to a policy of zero debt, relying solely on business revenues to drive our growth and operations.</p> <p>Through that time, we have put out four generations of best-in-class pupil transportation routing and planning software, designed and engineered additional major modules for telematics, student ridership management, and driver management, and successfully worked with clients of all sizes, from districts with only a handful of vehicles to top-ten districts like New York City, Chicago, and Dallas. In short, we are the most successful and most experienced provider of pupil transportation routing and planning software and services in the market today.</p> <p>As a closely-held, family-owned business, we keep our financial statements and other related financial information confidential. This decision aligns with our internal policies and the nature of our ownership structure and helps us maintain our competitive position in the market. As a market participant managing our finances in this manner for over 40 years, we are a stable, reliable partner with the right subject matter expertise and the best software offering for this opportunity.</p> <p>Thank you for your understanding and consideration. We look forward to the opportunity to collaborate and advance in the RFP process.</p> <p>Sincerely, Lam Nguyen-Bull General Counsel Education Logistics, Inc.</p>	*
14	What is your US market share for the Solutions that you are proposing?	<p>Education Logistics, Inc. (Edulog) clients have exceeded a total of 1,200 entities in 48 states. This includes the largest school transportation operation in North America (The New York City Department of Education), the largest school bus contractor (First Student), and every school district in the state of North Carolina. The Edulog system has been used to safely and efficiently route 6,000,000 students every school day.</p>	*

15	What is your Canadian market share for the Solutions that you are proposing?	We have place systems in the provinces of British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, and Quebec.	*
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Education Logistics, Inc. has never in its 40+ years in business entered into any bankruptcy proceedings.	*
17	How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?	<p>Since 1978, Education Logistics, Inc. (Edulog) has the been the leading supplier of cutting-edge technology for student transportation management in North America. Because we design, develop, test, license, support, maintain, and sell our company's own technology, then we should for the purposes of this RFP be considered a manufacturer and service provider to, among others: school districts; state education agencies; school bus contractors; charter schools; non-profit private and religious schools; and colleges/universities.</p> <p>Edulog's sales and service force is consists entirely of full-time employees of the company. All sales professionals have been trained in the use of our company products, and some of our sales staff have more than 20 years of experience with the company. Edulog sales staff interact not only with potential clients, but also current customers, and often act as project liaisons and promoters of the customer's goals.</p> <p>In addition to our sales staff, Edulog interaction with customers—either during the sales process or in continuing support—includes our executives, engineering staff, project managers, account managers, and our unique advisory services group. The total number of Edulog employees devoted to technology support and customer service far exceeds that of our competitors in the student transportation management industry. Of particular note is that several of our company's senior consultants previously held high-level positions as transportation directors of both city-wide and state-wide operations.</p> <p>Edulog is a people company, not just a software vendor. Edulog has the experience and knowledge to go beyond simple analysis and provide effective recommendations that result in verifiable and permanent improvements. Many Edulog team members have been assisting school districts for more than 20 years, and we collectively have nearly 700 years of experience with school transportation operations. But we go beyond merely sitting in an office and talking to clients on the phone: many projects embed Edulog staff at customer sites for weeks at a time, and several of the company's employees have actually been assigned to work side-by-side with client transportation staff for months, and in some cases, years. We've been with our clients during the preparation of a new school year's transportation plan and those first hectic weeks when recently-enrolled students need busing right away. And we've also been there when new school boundaries require major changes to bus routes during the winter break, or when a bond measure fails and the number of buses in service needs to be drastically reduced to meet the shrinking budget.</p>	*
18	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	Other than business and tax licenses/certifications held by Education Logistics, Inc. in various states, there are no licenses or certifications required for developers of transportation management software. Education Logistics, Inc. privacy and security processes and methodologies has been externally audited, and we are SOC 2 certified.	*
19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcwell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	In the past seven years, there are, and have been, no debarments or suspensions for Education Logistics, Inc. (Edulog). We affirm that we will provide notice in writing to Sourcwell if we enter a debarment or suspension status any time during the pendency of this RFP evaluation.	*

20	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>Earlier this decade the State of North Carolina directed the Department of Public Instruction to create a School Bus Safety Pilot Program to “transform and improve the transportation of public school students through technology in response to the COVID-19 pandemic.” Funding was allocated to eligible school district and charter schools to obtain this advanced technology—provided that each participating agency conducted its own competitive RFP process. As a result, Education Logistics, Inc. (Edulog) was awarded the vast majority of the School Bus Safety Pilot Program contracts.</p> <p>In 2023, Education Logistics, Inc. (Edulog) was named Samsara’s Public Sector Partner of the Year. Samsara is a publicly-traded company that provides software and hardware solutions to help organizations improve the safety, efficiency, and sustainability of their operations. Samsara is the Leader In Industrial IoT — All-in-one: GPS, ELD, safety cameras, telematics, maintenance, routing, driver app, and more. The company is recognized by the Forbes Cloud 100.</p> <p>Samsara’s customers include organizations in the construction, transportation, energy, utilities, public sector, and retail industries. Some of their customers include five of the top-10 waste management companies, six of the top-10 construction companies, and five of the top-10 transportation companies.</p>	*
21	What percentage of your sales are to the governmental sector in the past three years?	If school districts are considered to be in the governmental sector, then 90 percent of our company’s sales in the past three years have been in the governmental sector. The remaining ten percent of sales have been to other vendors who serve governmental sectors (such as school bus contractors) or to private, non-profit schools.	*
22	What percentage of your sales are to the education sector in the past three years?	If school bus contractors are included as being in the “education sector,” then 100 percent of our sales have been to the education sector in the past three years.	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	Education Logistics, Inc. has been awarded a contract under the nation-wide purchasing cooperative or interlocal (“cooperative”) 1Government Procurement Alliance (1GPA). The contract is #23-17PV-03 Transportation Routing, Planning, and Management Software. The average annual sales volume during the past three years for this contract has been approximately \$500,000.	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	We have no GSA contracts or Standing Offers and Supply Arrangements (SOSA).	*

## Table 2B: References/Testimonials

**Line Item 25.** Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *	
HOUSTON INDEPENDENT SCHOOL DISTRICT, TX	John Willcots	(713) 556-5934	*
MEMPHIS-SHELBY COUNTY SCHOOLS, TN	Stephen Wherry	(901) 416-6077	*
CLEVELAND METROPOLITAN SCHOOL DISTRICT, OH	Eric Taylor	(216) 838-0953	*

## Table 3: Ability to Sell and Deliver Solutions (150 Points)

Describe your company’s capability to meet the needs of Sourcewell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
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26	Sales force.	<p>The Education Logistics, inc. (Edulog) sales and service force is consists entirely of full-time employees of the company—with most of them residing near our company headquarters in Missoula, MT. All sales professionals have been trained in the use of our company products, and some of our sales staff have more than 20 years of experience with the company. Edulog sales staff interact not only with potential clients, but also current customers, and often act as project liaisons and promoters of the customer's goals.</p> <p>In addition to our sales staff, Edulog interaction with customers—either during the sales process or in continuing support—includes our executives, engineering staff, project managers, account managers, and our unique advisory services group. The total number of Edulog employees devoted to technology support and customer service far exceeds that of our competitors in the student transportation management industry. Of particular note is that several of our company's senior consultants previously held high-level positions as transportation directors of both city-wide and state-wide operations.</p> <p>Edulog's sales process, structured around educational and transportation technology solutions, involves several key stages aimed at aligning its services with the specific needs of school districts and educational institutions. Here's an outline our typical sales process:</p> <p><b>Lead Generation and Qualification:</b> Edulog begins by identifying potential leads, typically school districts and educational organizations needing transportation solutions including GPS/AVL, passenger ridership management, on-vehicle navigation, parental communication, and optimization.</p> <p>Leads are gathered through multiple channels, including online marketing, educational conferences, industry networking, and referrals. The Salesforce CRM is then used to qualify leads based on parameters like district size, transportation needs, and budget—thus ensuring that the most relevant leads are prioritized.</p> <p><b>Needs Assessment and Consultation:</b> Sales and account representatives conduct in-depth consultations with qualified leads, identifying their specific challenges, goals, and transportation requirements. Edulog's team customizes presentations or product demos to showcase relevant solutions, such as routing, fleet management, GPS tracking, and parent communication tools, explaining how each component addresses the client's needs.</p> <p><b>Product Demonstration and Customization:</b> Edulog provides live or virtual product demos, allowing prospects to experience the functionality and capabilities of our software. The sales team may also offer customized features or adjustments to fit the unique requirements of each school district, demonstrating the adaptability and scalability of Edulog's software solutions.</p> <p><b>Proposal and Pricing:</b> Based on the consultation and demo, Edulog's team drafts a proposal outlining the recommended services, pricing, and anticipated results or improvements—including the discounts that would be available as a result of a Sourcewell contract. Proposals typically include pricing structures tailored to the district's budget and scope, ensuring competitive offers and demonstrating potential cost savings from optimized transportation solutions.</p> <p><b>Contract Negotiation and Closing:</b> The sales team works closely with the client to address any questions and finalize contract terms, ensuring transparency and mutual understanding of the service agreement. Edulog's sales representatives collaborate with legal and finance departments to streamline contract approvals, and once both parties agree, the contract is signed.</p> <p><b>Onboarding and Implementation:</b> After contract closing, Edulog transitions the client to its onboarding and implementation team, who guide the client through software setup, data migration, and system integration. Training sessions are provided to ensure staff can fully utilize the new software, helping clients quickly achieve value from Edulog's solutions.</p> <p><b>Ongoing Support and Upselling:</b> Edulog maintains an ongoing relationship with the client, providing support and performance reviews to ensure satisfaction and continual service improvements. Opportunities for upselling additional products or premium support services may be explored as the client's needs evolve.</p> <p>Edulog's sales process emphasizes client-centricity, customization, and continuous support, aiming to build long-term relationships that adapt as educational transportation needs change.</p>
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27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	N/A—all sales of Education Logistics, Inc. (Edulog) products and services are direct to the customer from Edulog.	*
28	Service force.	<p>In addition to our sales staff, Edulog interaction with customers—either during the sales process or in implementation and continuing support—includes our executives, engineering staff, dedicated support staff, project managers, account managers, and our unique advisory services group. The total number of Edulog employees devoted to technology support and customer service far exceeds that of our competitors in the student transportation management industry. Of particular note is that several of our company's senior consultants previously held high-level positions as transportation directors of both city-wide and state-wide operations.</p> <p>Edulog's service force consists of specialized teams dedicated to supporting clients throughout the implementation, operation, and ongoing use of Edulog's transportation management software and hardware solutions. Our service teams prioritizes customer satisfaction by providing comprehensive technical assistance, training, and product optimization, thus ensuring that school districts and transportation agencies can maximize the value of Edulog's technology.</p> <p>Key components of Edulog's service force include:</p> <p>Implementation Specialists:</p> <ul style="list-style-type: none"> <li>o These experts guide new clients through the setup and configuration of Edulog's software. They ensure smooth data migration, system integration, and initial customization to meet each district's specific transportation needs.</li> <li>o The implementation team collaborates with clients to adapt Edulog's tools to their existing processes, minimizing disruptions and expediting the setup phase.</li> </ul> <p>Training and Education Specialists:</p> <ul style="list-style-type: none"> <li>o Edulog's service force includes trainers who educate clients on using the software effectively, both during onboarding and whenever new features are released.</li> <li>o Training sessions are tailored to the client's team, ensuring that users—ranging from transportation directors to dispatchers—are confident and skilled in navigating the software.</li> </ul> <p>Technical Support Team:</p> <ul style="list-style-type: none"> <li>o Available for troubleshooting and technical assistance, this team handles software issues, ranging from minor glitches to more complex functionality questions.</li> <li>o With a deep understanding of Edulog's products, the technical support professionals provide rapid support through phone, email, or remote sessions to resolve issues promptly and minimize downtime.</li> </ul> <p>Client Engagement and Success Managers (Account Managers):</p> <ul style="list-style-type: none"> <li>o Focused on customer satisfaction and long-term success, these managers work closely with clients to ensure they are fully utilizing Edulog's solutions.</li> <li>o They periodically check in with clients to assess performance, offer suggestions for enhanced usage, and address any concerns. They also facilitate communication between clients and other departments, such as Edulog engineering, for feedback-driven enhancements.</li> </ul> <p>Customer Feedback and Product Development (Account Managers):</p> <ul style="list-style-type: none"> <li>o Edulog's service force actively gathers client feedback to inform future software updates and new features. They work closely with the engineering (product development) team to ensure that customer needs and suggestions are incorporated into Edulog's technology roadmap.</li> </ul> <p>Product Optimization and Customization:</p> <ul style="list-style-type: none"> <li>o For clients with unique needs, Edulog offers specialized support to customize and optimize solutions. This may involve adjusting routing algorithms, modifying reports, or integrating third-party data sources.</li> <li>o The team continuously explores ways to enhance the software's performance and aligns it with the specific goals of each client.</li> </ul> <p>By combining implementation guidance, dedicated support, ongoing training, and proactive engagement, Edulog's service force enables clients to achieve successful, efficient, and safe transportation operations.</p> <p>Edulog has the experience and knowledge to go beyond simple analysis and provide effective recommendations that result in verifiable and permanent improvements. Many Edulog team members have been assisting school districts for more than 20 years, and we collectively have nearly 700 years of experience with school transportation operations. But we go beyond merely sitting in an office and talking to clients on the phone: many projects embed Edulog staff at customer sites for weeks at a time, and several of the company's employees have actually been assigned to work side-by-side with client transportation staff for months, and in some cases, years. We've been with</p>	*

		our clients during the preparation of a new school year's transportation plan and those first hectic weeks when recently-enrolled students need busing right away. And we've also been there when new school boundaries require major changes to bus routes during the winter break, or when a bond measure fails and the number of buses in service needs to be drastically reduced to meet the shrinking budget.
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>The Education Logistics, Inc. (Edulog) ordering process for its transportation solutions is designed to streamline procurement, ensure customization, and facilitate a smooth transition for clients. Here's an outline of the typical Edulog ordering process:</p> <p>Initial Consultation and Needs Assessment:</p> <ul style="list-style-type: none"> <li>o The ordering process begins with a consultation, where Edulog's sales team works closely with potential clients to assess their specific transportation needs and challenges—and discuss the benefits of the Sourcewell contract. This involves understanding the school district's size, fleet requirements, budget, and any unique considerations, which are then used to determine the best solutions to recommend.</li> </ul> <p>Proposal Development:</p> <ul style="list-style-type: none"> <li>o Based on the assessment, Edulog's team drafts a tailored proposal that outlines recommended products, features, and potential customizations to meet the client's needs—including the discount available as a result of Sourcewell participation.</li> </ul> <p>Proposal Review and Adjustments:</p> <ul style="list-style-type: none"> <li>o The client reviews the proposal and may request changes, such as adjustments in services, different pricing options, or additional features. Edulog's team collaborates with the client to refine the proposal, incorporating any required changes to better align with their operational goals.</li> </ul> <p>Approval and Order Form (Contract):</p> <ul style="list-style-type: none"> <li>o Once the proposal is finalized, the client is provided with a formal agreement (Edulog Order Form) to initiate the procurement of the software/hardware/services. Before presentation to the client, Edulog's finance and legal teams finalize the contract terms, confirming payment schedules, any initial fees, and billing arrangements—all based on discussions/negotiations with the client. The Order Form informs clients of the payment terms, which often include options for phased payments, especially if the implementation involves complex integrations or extended timelines.</li> </ul> <p>Onboarding and Implementation Scheduling:</p> <ul style="list-style-type: none"> <li>o After the contract is signed and the purchase is confirmed with a client purchase order, Edulog's implementation team coordinates with the client to schedule the onboarding and software setup process.</li> <li>o The implementation plan is detailed, covering timelines for data migration, system configuration, user training, and support resources.</li> </ul> <p>Training and Support:</p> <ul style="list-style-type: none"> <li>o Edulog provides training for users to ensure a successful launch of the new software, with ongoing support to address questions and help clients achieve their desired outcomes.</li> </ul> <p>This ordering process ensures that Edulog delivers tailored solutions and a clear roadmap for clients, setting up school districts for success with the most cost-effective and powerful transportation management and routing technology.</p> <p>Orders are handled directly between Edulog and the client.</p>
30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>Education Logistics, Inc. (Edulog) is fully committed to maintain and support all of its licensed installations. Software support and maintenance is provided in any of the following forms:</p> <ul style="list-style-type: none"> <li>o Whenever possible, Edulog will perform system diagnosis by directly accessing the client's system through the Internet and performing maintenance. Corrected data files or programs can be transferred through the Internet, allowing the client to be back in operation as soon as possible. Users can also upgrade and/or change software on site without the need to ship or return the system to Edulog for upgrading purposes.</li> <li>o If it is decided by Edulog management that corrections must take place on-site, Edulog will dispatch a technical representative to the client.</li> </ul> <p>The purpose of the software maintenance program is to ensure that Edulog is always in touch with the needs of all its clients, new and old, and that all Edulog installations are in the best operating conditions. Clients are notified of software upgrades through periodical newsletter releases. Interested clients who can make the time commitment are also invited to become members of an Edulog design review committee where changes and enhancements to the Edulog system are discussed and proposed for consideration by Edulog senior management.</p> <p>The Edulog Service, License, and Maintenance Plan provides free of charge for the:</p> <ul style="list-style-type: none"> <li>o Correction of any defect in the manuals, forms or programs;</li> <li>o Updates of user guides as required to ensure their continued usefulness;</li> <li>o Unlimited assistance by telephone (1-800 toll-free), fax, Internet, or mail regarding the use and operation of the system;</li> </ul>

o Updates to the software which include any expansions, modifications, or improvements to the system which relate to the operating performance but do not change the basic function of the software and which are not regularly charged for by Edulog to other clients as options. In the event that additional services (such as additional training or the configuration of a new attendance boundary plan) are required, these services will be charged to the client at Edulog's current standard time and material costs.

#### SUPPORT SPECIFICS

Edulog support hours are from 6:00 a.m.—6:00 p.m. Mountain Time Monday-Friday and seven days per week (at reduced daily hours on the weekend) from the first week of July through the first week of September. These support hours can be modified for Sourcewell customers in time zones other than Mountain. Major level issues are responded to within two working hours. Minor level support issues are responded to within eight working hours.

Technical support for the Edulog system can be provided remotely through the internet using Zoom, MS Teams, Skype, "Go to Meeting," etc.

Our Support Services Department now handles client issues using a four-tiered approach, in order to quickly escalate questions to the technical experts best-suited to the client's immediate needs.

The role of Account Manager has also been established to act as your advocate to ensure your needs are always met.

A complete log of all support inquiries is maintained by Edulog, and this information can be provided to the client upon request.

The client can change its support plan at any time.

#### QUALITY ASSURANCE PLAN

Edulog's quality program can best be described as a Continuous Process Improvement (CPI) system in which managers and staff work together to bring about constructive change. In our CPI approach to quality management, managers create an environment in which they, and the staff, focus technical product and service performance to meet the quality level acceptable to the client. This environment enables the managers and staff to think in terms of what is best for the client, and avoids the production of deliverables that meet client tolerances, but miss client needs. It instills the concept that product or service quality is only as good as what the client perceives, and that Edulog quality expectations will go beyond the requirements set in the contract.

This management approach has fostered ideas from staff and junior level personnel, which have become a part of the total Edulog approach to quality. During our thirty years of supporting school district transportation operations, this quality improvement philosophy has evolved to become the corporate standard for work performance. As a result, our technical performance and client satisfaction levels are continually improving. Though the CPI approach has greatly reduced the need for formal quality controls, quality assurance remains a key element in our overall quality management plan.

Edulog quality assurance procedures include continuous monitoring of a task as it is being performed and an in-depth review of all deliverables. Project managers direct the application of quality assurance procedures for all work under their supervision. Frequent reviews held by the project manager require project team members to prove progress against all technical, cost, and schedule milestones.

Effective quality control begins with the selection of competent personnel to perform assigned tasks. Early in project implementation, the project manager discusses with all assigned team members on the requirements and the review cycles of a project. This ensures that quality assurance (QA) requirements are known to all Edulog staff assigned to the project. During the performance of each task, quality control procedures are used to evaluate the services being performed and the deliverables being produced. If the QA performance falls short of standards, these reviews will identify the problem early enough to permit timely correction.

#### QUALITY CONTROL MEASURES

Edulog will use quality control measures to meet all challenges and will provide a system of checks and balances during the planning, installation, implementation, and training phases of the proposed project.

Tasks that are performed under Edulog's Quality Assurance Program include:

1. Project management and oversight by experienced staff

2. Final system specification approval based on customer criteria
3. Timeline review of staff availability with school district calendar
4. Server configuration and testing
5. Training on both user software and troubleshooting
6. Software customization and enhancements based on customer feedback
7. Ongoing reviews with appropriate customer staff to ensure customer satisfaction

#### CUSTOMER SATISFACTION MEASUREMENT

The Edulog team will track all written and verbal comments, and the comments and suggestions will be factored into all ongoing decisions and custom development efforts. The district can at any time contact Edulog to have a formal meeting and on-site system review if at any point the district is unsatisfied with the level of service delivery.

Edulog will provide an excellent level of customer service by closely maintaining, documenting, tracking and managing all inventory, purchase orders, service orders, RMAs, invoices, and work orders.

#### WORKAROUNDS AND SOLUTIONS

If a workaround is required so that the Edulog system can perform a task which is not inherent in the Edulog system processes or design, the workaround will be defined by the Edulog account manager in consultation with the client staff. After the definition of the workaround is agreed-upon, the workaround process will be tested by Edulog's testing staff before being documented for use by the client.

#### ISSUE TRACKING SYSTEM

Edulog uses an issue tracking system which employs ticket tracking so that all (Edulog, the client) can quickly and easily create, track, report upon, prioritize, manage, and resolve support issues and requests. In addition, Edulog uses a CRM (customer relations management) system to record all client contact, communication, and cases (issue resolution).

#### MAJOR/MINOR SEVERITY LEVELS

A major level support issue is defined as one that represents a complete loss of service or the complete unavailability of a significant feature—and no workaround exists. Examples of a major level support issue would be a system crash, the deletion of a database, or the failure to process incoming GPS data. Major level issues are responded to within two working hours. A minor level support issue would be one that produces apparently incorrect data or inconveniences the production efforts, but which does not render the entire system inoperable. Examples would be run directions that might not process properly, reporting errors in GPS times, or administrative reports which are not correctly formatted. Minor level support issues are responded to within eight working hours.

#### PROBLEM RESOLUTION

The key to problem resolution is early identification by account management through the review process. These reviews analyze current project status in terms of technical accomplishments, schedule, deliverables, staffing, other resource requirements, and cost. The final element included in the reviews is an assessment of potential problems. Account managers will individually review the status of each task to identify potential problems that could affect the team's support efforts.

Our account managers are aware of the resource requirements for all tasks associated with a client, and can reallocate resources to respond to problems, change of scope, and other conditions that affect a system use and/or performance in a quick and effective manner. To ensure that potential problems are identified as early as possible and that the greatest staffing flexibility can be effected to resolve the problem, the account managers maintain regular contact with all departments of Edulog.

31 Describe your ability and willingness to provide your products and services to Sourcewell participating entities.

Education Logistics, Inc. (Edulog) is most definitely ready, able, and willing to provide our products and services to Sourcewell participating entities.

Edulog has unparalleled experience in the school transportation industry. We have over 40 years of working with and learning from our clients, which is longer than any other major software vendor (some of whom have grown by acquisition, others who have simply tried to port solutions designed for other transportation scenarios to school transportation with mixed results). Edulog systems are relied upon to manage some of the largest and most complex student transportation operations in existence: New York City, Houston, Memphis, Dallas, Broward County (Fort Lauderdale, FL), Atlanta, the entire state of North Carolina, and First Student—the largest school busing service provider in North America.

32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	Education Logistics, Inc. (Edulog) is ready, willing, and able to provide your products and services to Sourcewell participating entities in Canada. We have had clients in Canada since the early 1990s, and are quite familiar with Canadian rules, regulations, and processes related to student transportation.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Education Logistics, Inc. (Edulog) is ready and willing to to serve participating entities in the entire geographic area of both the United States and Canada. We have implemented systems in 48 states and six provinces.	*
34	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	Education Logistics, Inc. (Edulog) will provide full access to our solutions for any account type of a Participating Entity.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Education Logistics, Inc. (Edulog) will apply no specific (or general) requirements and/or or restrictions to our participating entities in Hawaii and Alaska and in US Territories.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes, Education Logistics, Inc. (Edulog) will gladly extend terms of any awarded master agreement to nonprofit entities.	*

**Table 4: Marketing Plan (100 Points)**

Line Item	Question	Response *	
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>The Education Logistics, Inc. (Edulog) marketing strategy for promoting its partnership with Sourcewell will leverage a mix of targeted outreach, digital marketing, content creation, and direct engagement to reach school districts and educational organizations. A Sourcewell contract will enable Edulog to streamline purchasing for its clients, who can skip the lengthy RFP process by accessing pre-vetted vendor contracts. Here's how Edulog will approach marketing this opportunity:</p> <p>Targeted Messaging to School Districts:</p> <ul style="list-style-type: none"> <li>o Edulog's marketing will emphasize the ease and efficiency that Sourcewell offers for obtaining Edulog transportation solutions. Our messaging will highlight how Sourcewell simplifies the procurement process, reduces administrative overhead, and accelerates project timelines.</li> <li>o Edulog marketing materials such as emails, brochures, and social media posts will communicate the convenience, time savings, and compliance assurance offered by Sourcewell.</li> </ul> <p>Dedicated Website Landing Page</p> <ul style="list-style-type: none"> <li>o Edulog will create a website landing page focused on the Sourcewell partnership. This landing page will explain the cooperative purchasing benefits, outline the process for accessing Edulog's solutions via Sourcewell, and, in the future, feature testimonials or case studies from clients who have benefited from Edulog's relationship with Sourcewell.</li> <li>o The website will also include an FAQ section, contract details, and contact information to guide potential clients through the process.</li> </ul> <p>Webinars and Educational Content</p> <ul style="list-style-type: none"> <li>o Edulog will host webinars or informational sessions that introduce Sourcewell's cooperative purchasing model and explain how it applies to the best in transportation management solutions.</li> <li>o These webinars will feature demonstrations of Edulog products, insights into school transportation challenges, and explanations of how to leverage Sourcewell for streamlined purchasing.</li> </ul> <p>Digital Marketing and Social Media Campaigns</p> <ul style="list-style-type: none"> <li>o To broaden reach, Edulog runs digital marketing campaigns on platforms such as LinkedIn, Facebook, Instagram, and X (formerly Twitter), targeting educational leaders, procurement officers, and transportation directors.</li> <li>o Social media posts are tailored to showcase success stories, promote upcoming webinars, and will share informative articles about Sourcewell cooperative purchasing benefits and streamlined procurement.</li> </ul> <p>Customer Newsletter</p> <ul style="list-style-type: none"> <li>o Edulog publishes a quarterly newsletter which is sent to every one of our contact on our client list. Upon contract award, Sourcewell will be featured heavily and will have a spotlight every quarter moving forward.</li> </ul> <p>Partnership with Sourcewell's Marketing Channels</p> <ul style="list-style-type: none"> <li>o Edulog will gladly collaborate with Sourcewell's marketing team to leverage their established network and communication channels. Joint marketing efforts with Sourcewell will provide broader exposure and reinforce Edulog's position as a trusted vendor within the cooperative network.</li> </ul>	*

Industry Conferences and Trade Shows

- o Edulog attends or sponsors relevant conferences (such as the National Association for Pupil Transportation conference), where we will actively promote the Sourcewell opportunity to school transportation leaders.
- o At these events, Edulog's team will provide demos, informational materials, and live Q&A sessions to educate attendees about Sourcewell and the specific advantages of purchasing Edulog's solutions through the cooperative.

Email Marketing to Existing and Prospective Clients

- o Edulog will create email campaigns to inform both existing clients and prospects about the Sourcewell partnership, explaining how it can benefit districts already considering or using Edulog's solutions.
- o Email content will include updates on cooperative purchasing trends, customer success stories, and reminders of how Sourcewell can make Edulog's solutions more accessible.

Case Studies and Testimonials

- o To build credibility, Edulog will share case studies of school districts that successfully used Sourcewell to acquire an Edulog solution, focusing on cost savings, efficiency, and overall satisfaction. Testimonials from district leaders or transportation directors can reinforce the benefits and inspire similar organizations to consider this streamlined purchasing method through a Sourcewell contract.

By promoting the Sourcewell opportunity through these strategies, Edulog will demonstrate its commitment to making high-quality transportation solutions accessible while addressing the purchasing challenges school districts often face. This comprehensive approach will not only help Edulog reach potential clients, but also position Sourcewell as a valuable resource for a problem-free procurement.



38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Education Logistics, Inc. (Edulog) uses a variety of digital technologies and data-driven strategies to enhance its marketing effectiveness. By leveraging digital data, social media, metadata, and analytics, Edulog tailors its messaging, engages with key decision-makers in education, and continuously refines its approach. Here's a breakdown of our technology and digital data usage:</p> <p><b>Social Media Marketing and Engagement</b></p> <ul style="list-style-type: none"> <li>o Edulog actively uses platforms like LinkedIn, Instagram, X (formerly Twitter), and Facebook to connect with school district administrators, transportation managers, and education industry professionals.</li> <li>o We post regular content on topics such as transportation optimization, GPS/AVL, technology solutions, safety, and customer success stories. These posts are crafted to establish Edulog as a thought leader and trusted partner in transportation management.</li> <li>o Social media allows Edulog to engage directly with users, respond to inquiries, share relevant updates, and amplify awareness of product offerings and partnerships, such as the Sourcewell co-op.</li> </ul> <p><b>Targeted Digital Advertising</b></p> <ul style="list-style-type: none"> <li>o Edulog uses data-driven targeting for online advertisements, allowing us to reach specific audiences with precision. Using platforms such as Google Ads and LinkedIn, we can target key decision-makers in school districts by job title, interests, and geography.</li> <li>o Metadata and behavioral data collected from user interactions help Edulog refine its ad campaigns, creating ads that resonate with prospects and drive engagement on targeted landing pages.</li> </ul> <p><b>SEO and Metadata Optimization</b></p> <ul style="list-style-type: none"> <li>o Search engine optimization (SEO) is an integral part of Edulog's digital strategy. We optimize metadata, keywords, and page structure on our website and content to rank well in search results for terms such as "school transportation software," "school bus tracking," and "school bus notification." Metadata optimization helps increase visibility in organic search results, drawing relevant traffic to Edulog's website and maximizing the reach of product and service-related content.</li> </ul> <p><b>Analytics and Data-Driven Insights</b></p> <ul style="list-style-type: none"> <li>o Edulog uses analytics tools such as Google Analytics and CRM data to track user behavior, page views, click-through rates, and conversion metrics. These insights inform Edulog's understanding of what content resonates with visitors, helping us to optimize and enhance marketing strategies based on performance data.</li> </ul> <p><b>Email Marketing Automation</b></p> <ul style="list-style-type: none"> <li>o Email campaigns are automated and tailored based on user interactions, segmenting recipients by factors such as previous engagements, job role, and district size. By tracking open rates, click-throughs, and conversion rates, Edulog can refine messaging and timing.</li> <li>o The use of personalized content, such as updates on software features, upcoming events, and case studies, keeps potential clients engaged and nurtures leads toward conversion.</li> </ul> <p><b>Content Marketing and Lead Magnets</b></p> <ul style="list-style-type: none"> <li>o Edulog creates content such as whitepapers, webinars, case studies, and blog posts to position itself as a resource in student transportation management. These resources attract high-quality leads who are genuinely interested in Edulog's offerings.</li> <li>o By tracking engagement with specific content, Edulog can gauge interest levels and follow up with leads who show interest in particular solutions or topics, ensuring relevant follow-up and increasing lead-to-conversion rates.</li> </ul> <p><b>CRM and Customer Data Integration</b></p> <ul style="list-style-type: none"> <li>o By integrating customer data from its CRM (Salesforce), Edulog can target marketing based on existing relationships, past inquiries, and previous engagements. CRM insights allow Edulog to send highly relevant follow-ups and promotions, enhancing our approach with existing leads and clients.</li> </ul> <p>This multifaceted use of technology and digital data allows Edulog to execute a sophisticated marketing strategy. We can target precisely, engage effectively, and optimize continuously, ensuring our company remains visible and relevant in the competitive transportation technology landscape.</p>
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39	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>In the view of Education Logistics, Inc. (Edulog), Sourcewell will play a vital and critical role in promoting contracts awarded from the RFP by acting as a trusted intermediary that simplifies the purchasing process for school districts and educational institutions. Sourcewell's extensive network, established credibility, and resources help drive awareness of the contracts and will connect Edulog with potential clients who seek streamlined procurement solutions for a vetted vendor's products and services.</p> <p>Here's how Edulog envisions Sourcewell's role and integrates a Sourcewell-awarded contract into its sales process:</p> <ol style="list-style-type: none"> <li>1. Sourcewell's Role in Contract Promotion <ul style="list-style-type: none"> <li>• Expanding Reach: Sourcewell promotes awarded contracts to its member organizations, which includes school districts, municipalities, and other public entities across the U.S. By doing so, Sourcewell widens Edulog's visibility and reach beyond traditional channels.</li> <li>• Building Trust: As a cooperative purchasing organization, Sourcewell vets vendors through rigorous RFP processes. This endorsement builds trust with potential clients, helping Edulog bypass lengthy approval processes, especially with clients looking for pre-approved vendors.</li> <li>• Marketing Support: Sourcewell provides marketing support, including announcements, newsletters, and member outreach, which Edulog can leverage to promote its solutions to interested agencies, districts, and institutions.</li> <li>• Educating Prospects: Sourcewell educates its members on the benefits of cooperative purchasing, emphasizing the value of using pre-negotiated contracts. This helps prospects understand the streamlined procurement benefits when choosing Edulog through Sourcewell.</li> </ul> </li> <li>2. Integrating a Sourcewell-Awarded Contract into Edulog's Sales Process: <ul style="list-style-type: none"> <li>• Initial Lead Generation and Awareness: Edulog's sales team will target Sourcewell member organizations directly, promoting the Sourcewell-awarded contract as a quick, compliant purchasing option. Marketing efforts such as emails, social media posts, and webinars will highlight Sourcewell as a way to save time and costs.</li> <li>• Educational Outreach and Consultations: When engaging new leads, Edulog will educate them on using the Sourcewell contract for easy procurement. This includes showcasing how Sourcewell removes the need for a lengthy RFP process, allowing school districts and other agencies to begin implementation more quickly.</li> <li>• Customized Proposals and Demonstrations: During proposal stages, Edulog tailors presentations to emphasize the value and cost-effectiveness of choosing Sourcewell as a purchasing option. Product demonstrations and consultations will highlight how Sourcewell's pricing structure aligns with budget constraints.</li> <li>• Simplified Pricing and Contract Terms: Edulog incorporates Sourcewell's standardized pricing and terms into proposals, making the process more predictable and accessible for districts. This streamlining helps accelerate decision-making, especially for districts with tight purchasing timelines.</li> <li>• Continuous Support and Post-Sales Engagement: Once the sale is completed, Edulog provides ongoing support through its service force, using the relationship with Sourcewell as a point of continuity to build trust and satisfaction. Edulog's team maintains communication with Sourcewell for feedback, additional opportunities, and client referrals.</li> </ul> </li> </ol> <p>By leveraging Sourcewell's resources, credibility, and established network, Edulog will effectively integrate the Sourcewell-awarded contract into its sales process. This collaboration will ensure that school districts have a seamless purchasing experience while benefiting from Edulog's software and services without procedural delays.</p>
40	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	<p>Education Logistics, Inc. (Edulog) has long accepted electronic transmissions of contracts, purchase orders, and payments. We also send our clients invoices electronically.</p> <p>However, if by an e-procurement process, Sourcewell is describing something similar to how Amazon and other e-commerce sites accept and process customer sales, then no, Edulog does not currently have a similar e-procurement process, and we don't know of any other provider of student transportation management system that do. The reasons for this are two-fold:</p> <ol style="list-style-type: none"> <li>1. We offer a myriad of potential combinations for technology solutions, all tailored specifically to what a client might need. And because many of the products and services have dependencies (to order X, one must also select Y, unless Y was already ordered in a previous sale), it would be a monumental task to build a secure and accurate procurement site which took all of this into account (not to mention units of measure for pricing, applied discounts, total units ordered, etc.).</li> <li>2. Pricing and contract terms are always presented as written proposals, and are usually negotiated between Edulog and the client through requests and revisions. You will note in our submitted pricing catalog that the proposals must take into account the size of clients fleet (total number of vehicles), whether or not the prices are one-time or annual, which items are required (the aforementioned dependencies) and which are optional, etc. Then there are the contract terms and conditions to consider—these are often negotiated before contract execution between Edulog and the customer.</li> </ol>

Table 5A: Value-Added Attributes (100 Points)

Line Item	Question	Response *
41	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	<p>Education Logistics, Inc. (Edulog) provides training for all of its clients—either remotely, through webinars, our unique Edulog University, or on-site. Remote training is provided at either no charge or for the fees specified in our pricing catalog for all new installations.</p> <p>Timelines and training schedules will developed by the Edulog project management team in conjunction with the customer team, with the focus on ensuring that sufficient training will be provided to system operators and stakeholders as soon as possible. In addition, the customer can benefit from immediate on-line interactive training by enrolling its staff members in Edulog University (see a following section describing this unique new approach to operator-oriented system learning).</p> <p>Many of us at Edulog have a teaching background, and we know that quality instruction is crucial to effectively using new tools and techniques. Our approach to training is to use situations that you face every day as the instruction set, and then model the classroom sessions to fit your operations. We ask you what it is that you want to get done, and then we show you how to do it with plenty of hands-on system time.</p> <p>At the conclusion of each training session, attendees will receive a certificate of completion attesting to the skills that they have mastered as the result of the Edulog instruction.</p> <p>The exact training syllabus will be developed after consultation with the customer, but the following represents a sample training plan that can be used as a foundation for the discussion of the project plans. Note that this is only a sample description—and that there may be functions discussed in the following which are not applicable to the system proposed to each customer.</p> <p><b>SAMPLE EDULOG ROUTE MANAGEMENT TRAINING SYLLABUS</b></p> <p>Course Objective: To train a variety of users on the daily use and management of the Edulog route management software by progressing through three phases of increasing trainees' knowledge of the Edulog system.</p> <p>Course Content / Curriculum:</p> <p>I. Beginner Track</p> <ul style="list-style-type: none"> <li>A. Introduction to Edulog interfaces, tools, and interface navigation</li> <li>B. Map Work—Terminology and working with the map components</li> <li>C. Boundaries Work—working with and understanding boundary roles</li> <li>D. Schools—Introduction to school data</li> <li>E. Students—Working, searching and assigning student data</li> <li>F. Stops—Creating, assigning and working with stop data</li> <li>G. Runs—Creating, assigning stops, and working with run data</li> <li>H. Routes—Route creation and run assignment</li> <li>I. Querying Data Components—Introduction to base level querying of student, stop, run and route data</li> <li>J. Reports—Introduction to running and filtering reports</li> <li>K. EMU—Introduction to system maintenance</li> <li>L. Review—Question and Answer —May split into two sessions at the middle and the end of the Beginner track</li> </ul> <p>II. Intermediate Track</p> <ul style="list-style-type: none"> <li>A. Schools—In depth management of school data</li> <li>B. Students—Working with student assignment to stop components</li> <li>C. Stops/Runs/Routes—In depth work with transportation data</li> <li>D. EMU—In depth look at system maintenance and management</li> <li>E. Querying Data Components—In depth look at utilizing queries</li> <li>F. Reports—In depth look at creating and modifying reports</li> <li>G. Review—Question and Answer</li> </ul> <p>III. Advanced Track</p> <ul style="list-style-type: none"> <li>A. Special Needs Routing—Methods for routing for special needs students</li> <li>B. Transportation—Managing varying school schedules and transportation</li> <li>C. Transfers/Shuttling of Students—Understanding methods and procedures</li> <li>D. Map Management—Calibrating, managing map components</li> <li>E. Optimization—Utilizing optimization components to find efficiencies</li> <li>F. Review—Question and Answer</li> </ul> <p><b>SAMPLE EDULOG TELEMATICS (GPS/AVL) TRAINING SYLLABUS</b></p> <p>Course Objective: To train a variety of users on the daily use and management of the Edulog Transportation Management Software for GPS-based bus tracking.</p> <p>a. GPS/AVL Overview - The first introduction to the GPS/AVL application with specific</p>

focus on general concepts, data display, and tool familiarity.

b. Tracking Views—Create, customize, save and manage Tracking Views and learn how to display and evaluate data.

c. Planning Views—Navigate the benefits of comparative analysis (comparing GPS data to planned data) to manage the current day's transportation operation. We will create, customize, save and manage Planning Views.

d. Historical Views—Create, customize, save and manage Historical views which provide comparative analysis between the GPS data and the planned data from days in the past, allowing for data to allow for continuous improvement for the transportation operation and post incident analysis.

e. Unit Management—Track which devices are installed on specific vehicles and learn best practices for tracking histories of installations and swap outs of units.

f. Reports Module—Examine and evaluate numerous types of data stored by the system using a variety of pre-defined reports.

g. Tools—Learn how to use system tools to locate vehicles, schedule reports, substitute buses and create geofences to better manage your operation.

#### Course Content / Curriculum:

##### GPS/AVL Overview

- Accessing the software
- Various ways to view your data
- Navigating the environment
- Customizing the experience
- Accessing Modules
- Toolbars and Icons

##### Tracking Views

- Function of the view
- Organizing your data
- Adding Vehicles
- Analyzing/Reviewing your data
- Saving the view
- Help Menu
- Exercise 1—Explore Tracking Views

##### Planning views

- Function of the view
- Organizing your data
- Adding Vehicles
- Analyzing/Reviewing your data
- Saving the view
- Help Menu
- Exercise 2—Explore Planning Views

##### Historical views

- Function of the view
- Organizing your data
- Adding Vehicles
- Analyzing/Reviewing your data
- Saving the view
- Help Menu
- Exercise 3—Explore Historical Views

##### Unit Management Module

- Function of the Module
- Accessing your data
- Analyzing/Reviewing your data
- Reports
- Help Menu
- Exiting the module
- Exercise 4—Explore the Unit Management Module

##### Reports Module

- Function of the Module
- Accessing your data
- Analyzing/Reviewing your data
- Entering data manually
- Reports
- Help Menu
- Exiting the module
- Exercise 5—Explore the Reports Module

##### Tools

- Report Scheduler
- Vehicle Finder
- Vehicle and School Group Editor

- Resource Assignment Manager
- Bus Substitution
- Emergencies/Exceptions
- Geofences (in/out)

#### EDULOG UNIVERSITY: SELF-PACED, INTERACTIVE TRAINING FOR ALL EDULOG USERS

EduLog University is an on-line learning management system that is self-directed and self-paced, and which is modeled on the best practices of interactive instruction for adults. We believe that this offering is unique to the student transportation management software market, and is further evidence of EduLog's commitment to customer service and success. EduLog University can be used either in conjunction with EduLog instructor-led training (blending learning), or as a replacement for such training. Either way, the EduLog help desk is still a phone call away when a client staff member gets stuck.

Using interactive graphics, video, and audio, EduLog University is a revolutionary new development in transportation management system instruction and assessment. Open to any enrolled EduLog software operator/administrator (or any other client staff), EduLog University is accessible 24/7 at no additional charge to the transportation department. The modular design of the EduLog University curriculum allows for new courses to be quickly added to meet customer needs. In fact, the training staff for the statewide EduLog implementation in North Carolina was so impressed with EduLog University that discussions are now underway to customize the courses specifically for instructing all the system operators in the state of North Carolina.

With EduLog University and our new training methods, everyone is trained consistently and on the same topics, learning objectives, and subject matter. A limitation of traditional user instruction for transportation management systems is how the approach (and the knowledge received) can vary tremendously depending upon the instructor and the audience. The following situations are encountered by instructors on a regular basis: "we didn't cover that topic because we were rushed for time;" "the students were very intelligent so I went more in-depth with them than in my last class;" "I taught this approach to producing a report, but my coworker demonstrates an entirely different method."

In the EduLog University curriculum, all students are exposed to the same methods and processes, ensuring consistent instruction, examples, and methods. Students who do not quickly understand a subject are not left behind, there is no favoritism involved, and all have an equal opportunity to learn and increase their professional competency. EduLog University provides a benefit that cannot be matched by the singular training approach of other vendors. We would be delighted to present to the evaluation committee a demonstration of EduLog University in action.

Other advantages and benefits of EduLog University include:

#### ADMINISTRATIVE

- o Reduced Learning Costs—there is no need to pay fees for a trainer, travel and lodging expenses, or classroom rental, thus more money can be spent on other educational activities. Access to EduLog University is from any computer connected to the Internet: in the office, at home, or from a classroom.
- o Maximize Training Time—EduLog University is open 24 hours a day, and there is no limit on the number of staff who can be enrolled or concurrently receive instruction (one EduLog client recently asked to have more than 100 staff members take courses).

#### ACCOUNTABILITY

- o Easily Track Progress and Performance—students and supervisors can quickly and easily determine proficiency with the system and develop plans for increased competency.
- o Self-Assessment—staff can measure their progress, know which subjects they excel in and those in which they may need more work, and understand how further progress can be achieved. EduLog University is also an excellent tool for supervisors to use with performance evaluations and mentorship programs.
- o Reporting—information about individual test scores, time spent in instruction, modules completed and those still needed for competency is readily available to both students and supervisors.

#### BENEFITS TO THE STUDENT

- o Stay Organized and Up-To-Date—know what has been learned and what plans need to be made for further advancement.
- o Latest Adult eLearning Techniques—EduLog University uses best practices to provide learning stimulus beyond what can be provided from textbook, manual, or classroom-based instruction.
- o Concepts and Practical Experience—are presented through EduLog University and practiced by the student in as close to a real world simulation as possible.
- o Ready Reference Guide—included is an extensive and easy-to-search knowledge base with "just in time" training tips. With EduLog University it can be easier and quicker to get answers than calling the help desk—and EduLog University never closes.
- o Content Retention—adult learning theories make it clear that deeper and more



		<p>meaningful learning and retention occurs when learners can control the rate at which they move forward through segmented content.</p> <p>EDULOG ATHENA FRESHMAN YEAR PROGRAM</p> <p>Edulog has developed a unique service program (included in the software licensing fees) dedicated to ongoing customer success post-system implementation. This service program is called Athena Freshman Year and was developed in recognition of the fact that system implementation is only the beginning of an often lengthy and profound change management process clients must go through to achieve true success with their new systems. Athena Freshman Year picks up after software has been implemented and provides a whole business cycle's worth of enhanced client support to assist clients in fully integrating use of Edulog's software in their business processes. In addition to the standard Athena Freshman Year service, additional enhanced services (routing assistance, advisory services, etc.) are available for additional fees.</p>
42	Describe any technological advances that your proposed Solutions offer.	<p>Edulog Athena is the only transportation management software in the K-12 market that was built from the ground up with core transportation department needs (routing, dispatch, real-time tracking of vehicles and passengers, optimization, etc.) at its heart, and which incorporates best-in-class practices for enterprise resource planning, asset tracking, community engagement, contract management, and other functions, so that both large and small school district transportation departments can be an active agent of improvement and positive change in their districts. With the Edulog Athena system, transportation departments can go beyond merely coping, reacting, and responding, to being proactive and successfully initiating change.</p> <p>Edulog continues its tradition of innovation with the release of Athena, Edulog's revolutionary next generation school transportation management system. Athena is a cloud-based solution designed specifically for the complex operations of large school districts, and it is the most flexible and powerful system ever produced for K-12 transportation management and planning.</p> <p>In order to create this incredible system, Edulog returned to the drawing board, rebuilding its entire system from the ground up. Designing a new system from scratch is not an easy task, and that's why no one other than Edulog has done so. It has been clear for years now that large school district transportation operations are no longer required only to transport students to school safely and effectively. As school district operations generally become more sophisticated and integrated and more public-facing, so must transportation. Being able to do a job on the one hand, and being able to plan, work with stakeholders, report out, and be accountable on the other require very different skills and tools. For example, a district can have completely mastered getting a student to and from school more or less on time, but still struggle with the task of communicating timely and accurate information about that student's transportation and how it compares to plan.</p> <p>So, how has Edulog been able to accomplish what no other company can? First, Edulog's engineering staff has extensive experience in the fields of defense, medicine, and applied research (all domains with research and development teams and budgets dwarfing anything available to the entire school transportation industry). This experience with Big Data, AI, machine learning, and related technical fields has been instrumental in developing the Athena framework and the incorporation of new software techniques and designs inherently impossible to graft on to legacy systems.</p> <p>Next, Edulog has been engaged in student transportation projects beyond North America; places where school busing is a new concept and the mentality of "this is how things have always been done" doesn't exist. What we've learned from this experience—and have incorporated into the fundamentals of Athena—is that a truly modern student transportation management system needs to incorporate more than just routing and scheduling. Not only does the system need to accept, process, and communicate information from a variety of devices (mobile phones, tablets, GPS, student ID systems), it also must be responsive and inclusive to all stakeholders and users—parents especially, but also data analysts, school administrators and teachers, bus drivers and aides, and of course transportation department and busing vendor routers/dispatchers/planners.</p> <p>None of this is possible without effective and intelligent data modeling—again, something that cannot be "added on" to legacy systems. Because Athena has been designed from scratch, Edulog has brought its 40+ years of experience and reflection in school transportation to the development of models using business intelligence that truly solve the most difficult problems in the domain: user permission management, scheduling frequency, effective dates, integration of optimization, multi-dimensional display of large amount of data, substitutions, etc.</p> <p>Edulog's proposed solutions bring several technological advances that enhance the efficiency, safety, and transparency of school transportation. These innovations are designed to optimize routing, improve communication with parents and schools, and deliver actionable data insights. Here are key technological advancements that Edulog's solutions offer:</p> <p>Advanced Routing Algorithms and Artificial Intelligence (AI) Optimization</p> <ul style="list-style-type: none"> <li>• Edulog's routing software uses AI-driven algorithms to generate optimized bus routes, reducing travel time, fuel consumption, and overall costs for school districts.</li> </ul>



- The solution considers multiple factors, such as student location, traffic patterns, road conditions, and time constraints, to dynamically adjust routes based on real-time data. This flexibility helps ensure safe and efficient transportation while adapting to daily changes.

#### Real-Time GPS Tracking and Fleet Management

- Edulog's GPS tracking technology provides real-time visibility into vehicle locations, allowing customers to monitor their fleet at any time. This enhances safety by enabling immediate response to incidents and route deviations.
- Fleet managers gain access to detailed analytics on driver performance, fuel usage, idling, and maintenance needs, enabling better fleet management and cost savings.

#### Parent Communication and Mobile App Integration

- The Edulog Parent Portal app allows parents to track their child's bus in real-time, receive estimated arrival times, and set custom alerts for bus arrivals and departures. This reduces parent anxiety and enhances communication between schools and families.
- The mobile app integrates with Edulog's back-end system, ensuring that information is accurate and updated in real-time, minimizing the need for manual updates from the school district's offices.

#### Automated Student Ridership Tracking (RFID)

- Edulog offers RFID-based solutions that track when and where students board and exit the bus. This ensures accountability, provides a record of student location, and enhances security for each trip.
- This system reduces potential errors from manual attendance and supports automated alerts if a student doesn't board or exit at the expected stop.

#### Data Analytics and Reporting Tools

- Edulog's platform provides robust analytics and reporting tools that give transportation managers actionable insights into operational efficiency, cost metrics, and safety indicators.
- Customizable dashboards allow schools to track key performance metrics (KPIs) like on-time performance, route efficiency, and driver behavior, empowering data-driven decision-making to continuously improve transportation services.

#### Automated Route and Resource Optimization

- Edulog's advanced software automates route optimization by analyzing fleet size, capacity, student locations, and other data points to create the most efficient routes possible. This includes adjusting for fluctuating student populations and stop locations.
- Resource optimization tools help customers maximize fleet and driver utilization, reducing the need for additional vehicles or drivers and supporting overall cost savings.

#### Enhanced Integration Capabilities with District Systems

- Edulog's solutions integrate seamlessly with other district systems such as student information systems (SIS) and geographic information systems (GIS). This creates a unified platform for managing student data, bus routes, and ridership records.
- This integration reduces data silos, ensuring all relevant departments have access to updated and accurate information, enhancing overall operational efficiency.

#### AI-Enhanced Predictive Maintenance and Vehicle Health Monitoring Using Samsara

- The Samsara (Edulog is currently an authorized reseller of Samsara products and services) predictive maintenance technology uses AI to monitor vehicle health, tracking metrics such as engine performance, tire pressure, and battery levels to predict maintenance needs before issues arise.
- This reduces breakdowns, enhances vehicle reliability, and optimizes maintenance schedules, ultimately prolonging vehicle lifespan and reducing unexpected repair costs.

#### Geofencing and Safety Alerts:

- Edulog's platform offers geofencing capabilities that trigger alerts when a bus enters or exits designated zones (like school areas or student pickup zones). This adds an extra layer of safety and helps ensure buses remain on route.
- The system can send notifications to transportation managers and parents, increasing accountability and enhancing response times for any unexpected deviations.

These technological advances enhance Edulog's ability to offer comprehensive, data-driven solutions that increase operational efficiency, improve safety, and provide valuable insights for school districts. By embracing AI, real-time tracking, predictive analytics, and seamless integration, Edulog's solutions lead the way in modernizing school transportation.

43	Describe any “green” initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	<p>As a software developer, Education Logistics, Inc. (Edulog) doesn't have a fleet of vehicles or move supplies (on-vehicle hard-ware is shipped directly from the manufacturer/distributor to the client school districts), but we have made concerted efforts to be as sustainable as possible: a paperless office to the extent possible—some school district still require RFP submittals, contracts, letters, invoices, user manuals to be printed on paper); professional recycling of electronics and consumables (paper, plastic, aluminum, packing materials); an award-winning corporate headquarters refurbished from a former sugar beet factory (with one of the first ground source heat pumps installed in a commercial building in western Montana).</p> <p>Edulog's systems can significantly support green initiatives by optimizing transportation efficiency, reducing fuel consumption, minimizing emissions, and promoting sustainable practices in school districts. Here are some ways Edulog's solutions help districts meet their sustainability goals:</p> <p><b>Optimized Routing to Minimize Fuel Use</b></p> <ul style="list-style-type: none"> <li>Edulog's advanced routing algorithms use data analytics to design the most efficient routes, reducing total travel distance and time for each bus. Fewer miles driven mean reduced fuel consumption and emissions, contributing to a smaller carbon footprint.</li> </ul> <p><b>Efficient Fleet Utilization and Right-Sizing</b></p> <ul style="list-style-type: none"> <li>Edulog's software allows districts to analyze their fleet size and determine the optimal number of buses needed, preventing unnecessary buses from operating.</li> <li>By right-sizing the fleet and reducing idle or underutilized vehicles, districts can cut down on fuel costs, emissions, and maintenance, supporting greener operations.</li> </ul> <p><b>Idling Reduction Through Automated Alerts</b></p> <ul style="list-style-type: none"> <li>Edulog's GPS and in conjunction with Samsara's telematics management system can monitor and reduce idling time by sending alerts when a vehicle idles beyond a set threshold.</li> <li>Reducing idling time saves fuel and decreases emissions, helping districts comply with anti-idling regulations and promoting cleaner air around school zones and neighborhoods.</li> </ul> <p><b>Predictive Maintenance to Reduce Waste</b></p> <ul style="list-style-type: none"> <li>The predictive maintenance feature in Samsara's system monitors vehicle health in real-time, ensuring that maintenance is performed only when needed.</li> <li>By preventing unnecessary repairs and reducing the need for premature part replacements, districts reduce waste and save resources, supporting a more sustainable vehicle maintenance approach.</li> </ul> <p><b>Electric Vehicle (EV) Route Planning</b></p> <ul style="list-style-type: none"> <li>Edulog's software can optimize routes specifically for electric buses by taking into account (in a future release) range limitations, charging station locations, and battery levels.</li> <li>As more districts transition to EVs, Edulog's ability to accommodate these vehicles in its routing and fleet management software ensures efficient use of electric buses while reducing reliance on fossil fuels.</li> </ul> <p><b>Encouraging Active Transportation Options</b></p> <ul style="list-style-type: none"> <li>Edulog's solutions include tools that help districts plan and encourage active transportation options, such as walking and biking, for students in safe areas close to school.</li> <li>Reducing the number of bus routes for students within walkable distances cuts down on bus emissions and promotes a healthier, more sustainable approach to student transportation.</li> </ul> <p><b>Reduced Paper Use Through Digital Records</b></p> <ul style="list-style-type: none"> <li>Edulog's digital platform reduces the need for paper by managing records, reports, and communications electronically. All route planning, maintenance schedules, and performance metrics are stored digitally, eliminating paper waste.</li> <li>The ability to handle paperwork, alerts, and notifications digitally aligns with sustainability practices by reducing the district's environmental impact.</li> </ul> <p><b>Community Engagement on Sustainability Efforts</b></p> <ul style="list-style-type: none"> <li>Through features like the Parent Portal app, Edulog allows parents to access bus tracking and route updates digitally, reducing the need for printed schedules.</li> <li>The app can also be used to communicate the district's sustainability efforts, engaging parents and the community in green initiatives and creating awareness around emissions reduction and eco-friendly transportation practices.</li> </ul> <p><b>Cost Savings Reinforcement for Green Initiatives</b></p> <ul style="list-style-type: none"> <li>By cutting operational costs through optimized routes and reduced fuel usage, Edulog enables districts to redirect savings toward further green initiatives, such as expanding their electric bus fleet or installing charging infrastructure.</li> <li>This aligns with long-term sustainability goals, making green initiatives more feasible within tight school district budgets.</li> </ul> <p>Overall, Edulog's technology supports school districts in adopting more sustainable practices, significantly reducing their environmental impact through efficient routing, fleet management, and data-driven decision-making.</p>
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44	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	We don't know of any third-party issued eco-labels, ratings or certifications that have ever been issued/awarded to school bus transportation management software developers--the software itself is a rather niche market compared to other domains of school transportation (such as alternative fuel vehicles) regarding energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	*
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	<p>How is Edulog unique?</p> <ul style="list-style-type: none"> <li>o Edulog has unparalleled experience in the school transportation industry. We have more than 40 years of working with and learning from our clients, which is longer than any other major software vendor (some of whom have grown by acquisition, others who have simply tried to port solutions designed for other transportation scenarios to school transportation with mixed results). Edulog systems are relied upon to manage some of the largest and most complex student transportation operations in existence: New York City, Houston, Memphis, Broward County (Fort Lauderdale, FL), Atlanta, the entire state of North Carolina, and First Student--the largest school busing service provider in North America.</li> <li>o Edulog Athena is the only transportation management software in the K-12 market that was built from the ground up with core transportation department needs (routing, dispatch, real-time tracking of vehicles and passengers, optimization, etc.) at its heart, and which incorporates best-in-class practices for enterprise resource planning, asset tracking, community engagement, contract management, and other functions, so that large transportation departments can be an active agent of improvement and positive change in their districts. With the Edulog Athena system, transportation departments can go beyond merely coping, reacting, and responding, to being proactive and successfully initiating change.</li> <li>o Edulog is a people company, not just a software vendor. Edulog has the experience and knowledge to go beyond simple analysis and provide effective recommendations that result in verifiable and permanent improvements. Many Edulog team members have been assisting school districts for more than 20 years, and we collectively have nearly 700 years of experience with school transportation operations. But we go beyond merely sitting in an office and talking to clients on the phone: many projects embed Edulog staff at customer sites for weeks at a time, and several of the company's employees have actually been assigned to work side-by-side with client transportation staff for months, and in some cases, years. We've been with our clients during the preparation of a new school year's transportation plan and those first hectic weeks when recently-enrolled students need busing right away. And we've also been there when new school boundaries require major changes to bus routes during the winter break, or when a bond measure fails and the number of buses in service needs to be drastically reduced to meet the shrinking budget.</li> </ul> <p>Quite simply, Edulog is the best partner, bringing the best solutions, to small and large, simple or complex K-12 transportation operations. This fact has been emphasized by RFP contract awards made to Edulog in the past few years. After evaluating all of the available systems, the Houston Independent School District, the Chicago Public Schools, the Dallas Independent School District, and the Duval County Schools (Jacksonville, FL) all selected Edulog to replace their legacy transportation management systems.</p> <p><b>A GAME-CHANGING SOLUTION</b></p> <p>With Edulog Athena, customers can plan and manage all daily and long-term busing activities with intuitive, easy-to-use workspaces customized for each user and role. Athena gives you the tools to quickly and correctly act upon changing circumstances and know with certainty what buses are doing at all times. Athena gives you solutions that make routing simple.</p> <ul style="list-style-type: none"> <li>o Integration - Athena integrates with many third-party systems, such as all major student information systems (including PowerSchool), pulling and populating your transportation rosters, eligibility, and more based on your district's daily records; most AVL/GPS systems (including Zonar and Samsara); etc.</li> <li>o Efficient User Interface - It's easy to select and assign multiple students to stops, quickly assign stops to runs, and do it all right from the map. Performing your most common routing tasks is fast, easy, and intuitive.</li> <li>o Better, Faster, Stronger - Enhanced management processes for mapping, automated student scheduling, routing optimization available as a routine routing operation, bus substitutions in GPS tracking, etc.</li> </ul> <p>Athena offers everything that you need for safe, efficient, economical student transportation management, without the need to open separate applications or use non-integrated software from two or more vendors. It is all backed by more than 40 years of experience and the innovation that only Edulog can provide. Everything you need is in one place from the most experienced and knowledgeable vendor in the industry. Unlike other companies, we only do K-12 transportation management. Students are not packages out for delivery, and everything we do is focused on the safe and efficient busing of children.</p> <ul style="list-style-type: none"> <li>o GPS/AVL Data in Routing - Compare what actually happens on the road to your plan.</li> <li>o Transportation Requests - An Athena exclusive is a smartphone app parents can use to request new or different transportation plans. The system streamlines request processing</li> </ul>	*

		<p>(managing by exception in many instances), manages student itineraries, and quickly generates bus passes and parent messages.</p> <ul style="list-style-type: none"> <li>o What-If Scenarios – Stay prepared by creating and testing alternate plans in a sandbox environment that seamlessly converts into your operational routing plan when you're ready.</li> <li>o Instant Results – Visualize the impact of small changes and optimize on the go.</li> </ul> <p>Edulog Athena is the only system that manages individual student transportation complexities in a way that makes sense: have all of the student's busing information stored in a rich, yet effective and efficient data structure that can display, plan, and manage a student's trips for today, next week, and three months from now.</p>
46	Describe your approach to data privacy, including any certifications or standards achieved, in regard to your proposed solutions.	<p>The Education Logistics, Inc. (Edulog) Athena software is a cloud-based system using AWS (Amazon Web Services). The benefits of an Edulog AWS-hosted system include: there will be no need for district IT support of either software or server hardware; the software will always be up-to-date with latest version without any involvement from the district; and the district will have no obligation for data and system operations involving new release installations, backups, system patching, etc. Another advantage of AWS hosting is that electrical outage or a disaster (fire, hurricane, lightning strike, flood) at the district's IT facility will not bring down the system.</p> <p>With an AWS-hosted Edulog system, the client school district would have full access to its data just as it would with a district-hosted system, and AWS data security is recognized for its superiority at storage and transmission of even the most sensitive information. From the AWS website:</p> <p>"To aid your compliance efforts, AWS regularly achieves third-party validation for thousands of global compliance requirements that we continually monitor to help you meet security and compliance standards for finance, retail, healthcare, government, and beyond. You inherit the latest security controls operated by AWS, strengthening your own compliance and certification programs, while also receiving access to tools you can use to reduce your cost and time to run your own specific security assurance requirements. AWS supports more security standards and compliance certifications than any other offering, including PCI-DSS, HIPAA/HITECH, FedRAMP, GDPR, FIPS 140-2, and NIST 800-171, helping satisfy compliance requirements for virtually every regulatory agency around the globe."</p> <p>Amazon Web Services is used by, among others, the CIA, the Department of Defense, NASDAQ, and Netflix.</p> <p>Edulog takes a rigorous approach to data privacy, ensuring that its solutions comply with industry standards and provide a secure environment for school transportation and student data. This commitment includes following strict data protection protocols, adhering to applicable regulations, and obtaining relevant certifications (such as SOC2).</p> <p>Education Logistics, Inc. privacy and security processes and methodologies has been externally audited, and we are SOC 2 certified. In addition, all employees are required to pass frequent on-line tests related to electronic privacy and data protection.</p> <p>For threat and vulnerability management, we use these design principles: strong identity management, enable traceability, defense in depth, automate security best practices, protect data in transit and at rest, prepare for security events. We propose to use AWS Guard Duty and Security Hub which analyze threats listed by their AWS partners.</p> <p>We use AWS Shield for mitigating DDOS, AWS Inspector to scan EC2s for vulnerabilities, Zoomeye for perimeter scanning. Adding WAF (Firewall). Static and dynamic scanning of source code. AWS catalog and AWS config services to manage expected and as-is system configuration.</p> <p>For auditing, we use AWS IAM dashboard. IAM allows the user to access reports like:- Access analyzer report - re: access to a specific resource; Credential report - re: user info, created time, last password changed time, next password due time, last accessed time, etc.; Organization activity report - re: which account (organizational unit) accessed what resources.</p> <p><b>EDULOG ATHENA AND SECURE BY DESIGN PRINCIPLES</b></p> <p>Athena is designed from the ground up with "Secure by Design" principles. Basic information security principles have been incorporated into the way Athena uses, accesses, and displays data.</p> <ul style="list-style-type: none"> <li>o Confidentiality</li> <li>o Integrity</li> <li>o Availability</li> </ul> <p>Athena's role-based access/authorization design promotes all three of these information security principles. Athena's standard cloud instance keeps data at rest encrypted, using an AWS-provided security service. Data integrity is maintained through designations of data sources as sources of record for various categories of data, and permitting manual corrections by authorized users as necessary.</p>

## Security principles:

1. Minimize attack area – role-based access/authority means that people have access to only the features they need. The Athena client has been designed to be thin and light, minimizing information held in the browser and limiting points of access to substantive data. The thin client design means that most of the data processing and computing happens on the server, simplifying security monitoring and controls, and patching/fixes when necessary.
2. Secure defaults baked into Athena
  - a. New users receive the lowest privilege access appropriate and have to take affirmative steps to get more privileges
  - b. Strong password security requirements
  - c. Frequent password resets
3. Principle of least privilege – roles are provided the minimum set of privileges required to fulfill tasks
4. Defense in depth – multiple layers of security (identity and access management, robust network security controls like firewalls, Endpoint OS versions and security patches, audit trails, intrusion detection and prevention)
5. Fail securely – Athena incorporates this principle by ensuring that exceptions to security controls are followed by a “dis-allow” operation and do not inappropriately expose any internal subsystems.
6. Don't trust services – Athena does not allow third-party services to access our functionalities.
7. Separation of duties – handled by role-based access/authority
8. Security by obscurity is insufficient. Athena does not use obscurity as a security measure.
9. Security should be simple – simple security control architecture promotes maintenance and integrity; role-based access/authorizations and thin-client design simplify the security architecture without compromising security.

## Compliance with Data Privacy Regulations

- Edulog aligns its data privacy practices with regulations such as the Family Educational Rights and Privacy Act (FERPA) and the Children's Online Privacy Protection Act (COPPA), both of which are essential for handling student information in the United States. FERPA requires schools and vendors to protect student education records, while COPPA focuses on the privacy and protection of children under the age of 13. Edulog ensures that student data is handled in accordance with these laws.

## Industry Standards and Certifications

- To reinforce its commitment to data security, Edulog works toward adopting industry-standards such as ISO 27001 for information security management, which demonstrates adherence to globally recognized best practices in data protection.
- Edulog also adopts encryption standards and secure data storage practices that meet or exceed industry norms, helping protect sensitive student data against unauthorized access and breaches.

## Access Controls and Data Minimization

- Edulog employs strict access controls to ensure that only authorized personnel have access to sensitive data. This approach minimizes the risk of data exposure by granting limited, role-based access to the Edulog platform.
- Edulog follows the principle of data minimization, collecting and storing only the necessary data required to perform essential services. This limits the exposure of student information and reduces potential vulnerabilities.

## Parental Control and Security

- For applications like the Parent Portal, Edulog places a strong emphasis on security while allowing parents to track and monitor their child's transportation data. The system provides clear guidelines on data usage and safeguards data in transit and at rest with secure encryption.

In summary, Edulog's approach to data privacy is comprehensive, adhering to key regulatory frameworks and implementing robust security measures to protect sensitive information. The company's commitment to data privacy helps ensure a safe, compliant environment for school transportation solutions, aligning with the privacy expectations of educational institutions and their communities.



47	Describe any current or potential capabilities your proposed solutions offer in V2G (vehicle to grid) or similar smart city applications.	<p>EduLog's technology, while primarily focused on school transportation management, holds potential for integration with V2G (vehicle-to-grid) and smart city applications, especially as the industry moves toward more electrified and connected transportation solutions.</p> <p>Optimized Routing and Electric Vehicle (EV) Support</p> <ul style="list-style-type: none"> <li>EduLog's routing software can support the integration of electric school buses, which can be essential for V2G applications. By managing routes efficiently and accommodating EV-specific needs, such as route optimization based on charging requirements, the EduLog system would help school districts reduce costs and improve sustainability. As the adoption of EVs in school fleets grows, this technology may integrate further with V2G systems, where idle school buses could serve as energy storage units for the grid.</li> </ul> <p>Fleet Management and Data Integration for Smart Cities</p> <ul style="list-style-type: none"> <li>EduLog's fleet management capabilities could align with smart city data networks, offering city planners insights into vehicle usage, traffic patterns, and fleet efficiency. This data could inform broader urban infrastructure needs, such as optimizing charging station locations or planning V2G-compatible parking facilities for energy feedback to the grid. Real-time GPS tracking and geofencing capabilities enable better coordination within smart city frameworks, especially during peak energy demand or emergency scenarios.</li> </ul> <p>Interoperability with Smart Grids and Energy Providers</p> <ul style="list-style-type: none"> <li>The use of EduLog's GPS, telemetry, and scheduling data could, in the future, enable communication with energy providers in a V2G setup. For example, with controlled charging and discharge cycles, EVs within a fleet could be charged during off-peak hours and discharge energy back to the grid during peak demand, supporting grid stability. EduLog's data integration capabilities could allow school buses to serve as energy assets, aligning with broader smart grid management and demand response programs.</li> </ul> <p>EduLog's existing and potential support for V2G applications could be particularly beneficial for school districts that want to participate in energy sustainability initiatives, leveraging their fleets as both transportation and energy resources.</p>	*
48	Describe any capabilities around safety and accident management your proposed solutions offer.	<p>Education Logistics, Inc. (EduLog)—either with its own systems or in conjunction with Samsara products and services (or those of other school bus GPS vendors)—provides integrated solutions that enhance student transportation safety and support accident management through features and capabilities focused on safe bus stop assignments, in-vehicle telemetry, and accident reporting.</p> <p>EduLog's Safe Stop Assignments and Routing Management</p> <ul style="list-style-type: none"> <li>EduLog's software allows districts to design bus routes that incorporate safety parameters such as no-walk zones, no-cross streets, and hazard zones where busing must be provided. These features ensure that students are picked up and dropped off at the safest, most accessible locations.</li> <li>Right-side-only pickups and door-to-door service capabilities are available to reduce the risk of students crossing the street. These options are especially valuable for younger or vulnerable students who need additional safety measures.</li> <li>EduLog's geofencing and mapping technology (including satellite imagery and Google Street view to visualize the route a bus would take) also help school districts make data-driven decisions when assigning bus stops, ensuring compliance with district policies and promoting student safety.</li> </ul> <p>Samsara's On-Bus Telemetry and Driver Behavior Monitoring</p> <ul style="list-style-type: none"> <li>Samsara's telematics systems provide comprehensive tracking of vehicle paths, including real-time location data and historical route records, which can be used to analyze and optimize routes. This data is crucial for understanding the circumstances of any accidents and for monitoring fleet efficiency.</li> <li>Samsara's hard-braking and acceleration tracking captures sudden stops and starts, which can indicate risky driving behavior. This data can be used to coach drivers on safer practices, reducing the likelihood of accidents.</li> <li>Speed monitoring ensures that drivers adhere to speed limits, especially in sensitive areas such as school zones. Data on excessive speeding incidents can be integrated with EduLog's routing software to highlight areas for improvement in driver safety.</li> <li>Samsara offers camera integrations that record events inside and outside the bus. Cameras can automatically save footage during incidents like hard braking or sharp turns, which aids in accident investigations and provides a clear record of events. This can also help protect drivers in cases where additional context is necessary for incidents on the road.</li> </ul> <p>Integration for Incident Reporting and Driver Accountability</p> <ul style="list-style-type: none"> <li>By combining EduLog's and Samsara's capabilities, school districts gain a powerful safety tool that not only optimizes bus stop safety but also provides a clear digital footprint for driver accountability. Recorded video, speed data, and telemetry can be used for accident reporting, giving administrators a holistic view of each incident, from video evidence to driver behavior analytics.</li> </ul> <p>Together, EduLog's routing intelligence and Samsara's telemetry offer a robust framework for promoting safety in student transportation. These solutions enable districts to proactively improve safety, respond to incidents effectively, and provide parents and communities with transparency regarding student transportation safety.</p>	*



**Table 5B: Value-Added Attributes**

Line Item	Question	Certification	Offered	Comment
49	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or re-sellers if available. Select all that apply.		<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, Education Logistics, Inc. is a minority owned business—and is certified as such by the Northwest Mountain Minority Supplier Development Council, an Affiliate of the National Minority Supplier Development Council, Inc.
50		Minority Business Enterprise (MBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, Education Logistics, Inc. is a minority owned business—and is certified as such by the Northwest Mountain Minority Supplier Development Council, an Affiliate of the National Minority Supplier Development Council, Inc.
51		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input type="radio"/> No	
52		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input type="radio"/> No	
53		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input type="radio"/> No	
54		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input type="radio"/> No	
55		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input type="radio"/> No	
56		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input type="radio"/> No	
57		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input type="radio"/> No	

**Table 6: Pricing (400 Points)**

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *
58	Describe your payment terms and accepted payment methods.	<p>Education Logistics, Inc. (Edulog) is more than willing to negotiate with any participating entity our payment terms and accepted payment methods. Currently accepted payment methods are: checks and electronic bank transfers.</p> <p>The following text is also found in the sample Order Form submitted by Education Logistics, inc. (Edulog).</p> <p><b>FEES AND PAYMENT</b></p> <p>a. License and/or User Fees. Customer shall pay all fees specified in the Order Form. Fees are quoted and payable in U.S. dollars and, unless specified otherwise in an Order Form, are based on Products and Services purchased and not actual usage. Customer's payment obligations are non-cancelable, and fees paid are non-refundable.</p> <p>b. Invoicing and Payment. Unless otherwise specified, EDULOG will invoice Customer for all amounts due in the first year, including license fees, upon signature of the associated Order Form. Invoiced charges are due net thirty (30) days from the invoice date. Customer</p>

is responsible for maintaining complete and accurate billing and contact information with EDULOG. EDULOG will order hardware only upon receipt of payment from Customer for hardware. License fees are deemed earned and non-refundable irrespective of software usage.

c. Overdue Charges. If any charges are not received from Customer by the due date, then at EDULOG's discretion: (i) such charges may accrue late interest at the rate of 1.5% of the outstanding balance per month, or, if lower, the maximum rate permitted by law, from the date such payment was due until the date paid; and/or (ii) EDULOG may condition future renewals on payment terms shorter than those specified in Section 4b (Invoicing and Payment).

d. Suspension of License/Access and Acceleration. If any amount owing by Customer under this or any other agreement for EDULOG's Products or Services is thirty (30) or more days overdue, EDULOG may, without limiting its other rights and remedies, accelerate Customer's unpaid fee obligations so that all such obligations become immediately due and payable, and suspend Customer's license to Software and/or access to Cloud-Based Solution, Hardware, or Services until such amounts are paid in full.

e. Taxes. Unless otherwise stated, fees do not include any taxes, levies, duties (including customs duties) or similar governmental assessments of any nature, including, but not limited to, value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction (collectively, "Taxes"). Customer is responsible for paying all Taxes associated with fees paid hereunder. If EDULOG has the legal obligation to pay or collect Taxes for which Customer is responsible hereunder, the appropriate amount shall be invoiced to and paid by Customer, unless it provides EDULOG with a valid tax exemption certificate authorized by the appropriate taxing authority. For clarity, EDULOG is solely responsible for Taxes assessable against it based on its income, property and employees.

f. Annual Fee Increases. Fees will be increased each year and the amount of such increase will be based on the percentage rate of increase for the immediately preceding 12-month period in the Consumer Price Index, All Urban Consumers, United States, All Items (1982 - 1984 = 100) ("CPI"), as published by the Bureau of Labor Statistics of the United States Department of Labor. This adjustment will take place on the anniversary date of the Agreement each year. The base for the adjustment will be the CPI figure last published by the U.S. Department of Labor prior to the adjustment date. For each succeeding year, the same procedure will be applied.

g. Expenses. Unless otherwise specified in an Order Form, all travel, accommodation and out-of-pocket expenses incurred by EDULOG in connection with the provision of Products and/or Services (including installation, implementation, training, maintenance) shall be paid by Customer. Expenses for meals will be charged at a rate not to exceed Federal Travel Regulations (FTA) Sec. 301. If Customer's staff travels to Montana for training, all travel and lodging expenses will be the responsibility of the Customer. \*

The following text is also found in the sample Order Form submitted by Education Logistics, inc. (Edulog).

#### FEES AND PAYMENT

a. License and/or User Fees. Customer shall pay all fees specified in the Order Form. Fees are quoted and payable in U.S. dollars and, unless specified otherwise in an Order Form, are based on Products and Services purchased and not actual usage. Customer's payment obligations are non-cancelable, and fees paid are non-refundable.

b. Invoicing and Payment. Unless otherwise specified, EDULOG will invoice Customer for all amounts due in the first year, including license fees, upon signature of the associated Order Form. Invoiced charges are due net thirty (30) days from the invoice date. Customer is responsible for maintaining complete and accurate billing and

contact information with EDULOG. EDULOG will order hardware only upon receipt of payment from Customer for hardware. License fees are deemed earned and non-refundable irrespective of software usage.

c. Overdue Charges. If any charges are not received from Customer by the due date, then at EDULOG's discretion: (i) such charges may accrue late interest at the rate of 1.5% of the outstanding balance per month, or, if lower, the maximum rate permitted by law, from the date such payment was due until the date paid; and/or (ii) EDULOG may condition future renewals on payment terms shorter than those specified in Section 4b (Invoicing and Payment).

d. Suspension of License/Access and Acceleration. If any amount owing by Customer under this or any other agreement for EDULOG's Products or Services is thirty (30) or more days overdue, EDULOG may, without limiting its other rights and remedies, accelerate Customer's unpaid fee obligations so that all such obligations become immediately due and payable, and suspend Customer's license to Software and/or access to Cloud-Based Solution, Hardware, or Services until such amounts are paid in full.

e. Taxes. Unless otherwise stated, fees do not include any taxes, levies, duties (including customs duties) or similar governmental assessments of any nature, including, but not limited to, value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction (collectively, "Taxes"). Customer is responsible for paying all Taxes associated with fees paid hereunder. If EDULOG has the legal obligation to pay or collect Taxes for which Customer is responsible hereunder, the appropriate amount shall be invoiced to and paid by Customer, unless it provides EDULOG with a valid tax exemption certificate authorized by the appropriate taxing authority. For clarity, EDULOG is solely responsible for Taxes assessable against it based on its income, property and employees.

f. Annual Fee Increases. Fees will be increased each year and the amount of such increase will be based on the percentage rate of increase for the immediately preceding 12-month period in the Consumer Price Index, All Urban Consumers, United States, All Items (1982 - 1984 = 100) ("CPI"), as published by the Bureau of Labor Statistics of the United States Department of Labor. This adjustment will take place on the anniversary date of the Agreement each year. The base for the adjustment will be the CPI figure last published by the U.S. Department of Labor prior to the adjustment date. For each succeeding year, the same procedure will be applied.

g. Expenses. Unless otherwise specified in an Order Form, all travel, accommodation and out-of-pocket expenses incurred by EDULOG in connection with the provision of Products and/or Services (including installation, implementation, training, maintenance) shall be paid by Customer. Expenses for meals will be charged at a rate not to exceed Federal Travel Regulations (FTA) Sec. 301. If Customer's staff travels to Montana for training, all travel and lodging expenses will be the responsibility of the Customer.

59	Describe any leasing or financing options available for use by educational or governmental entities.	<p>Edulog does not currently offer leasing and financing options. However, many of our products and services are based on monthly or annual fees, which mitigates the initial acquisition expense for school districts. This pricing is designed to make Edulog's advanced technology solutions more accessible, particularly for school districts and local government agencies that face capital limitations. For example, Edulog's Software-as-a-Service (SaaS) licensing is similar to leasing in that Edulog enables school districts to use our transportation management software under a subscription-based model. This model allows educational institutions to avoid high upfront costs by paying manageable monthly or annual fees.</p> <p><b>Possible Third-Party Financing Partnerships</b> If requested, Edulog could explore a collaboration (it has done so in the past) with financing companies that specialize in educational and governmental leases, enabling more flexible financing terms that can include multi-year payment plans and interest-free options for qualified entities. These partnerships could provide clients with access to financing options that align with their fiscal cycles, such as annual budgets and grants.</p> <p><b>Grant and Funding Assistance</b> Edulog has considerable experience with helping school districts identify and apply for available grants and government funding that can be used for technology purchases. This includes guidance on relevant federal and state grants geared toward school safety and operational efficiency (such as the state of North Carolina's state-funded Smart School Bus Safety Pilot Project).</p>	*
60	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	The standard Education Logistics, Inc. (Edulog) Order Form with Terms and Conditions and addenda for Software, Hardware, and Cloud-Based Solutions have been uploaded through this submittal portal—and also our Service Level Addendum.	*
61	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	No we, don't currently have a P-card procurement and payment process—but one could be established if granted a Sourcwell award. If that were to occur, the additional cost for such a payment method to Sourcwell participating entities would be four (4) percent.	*
62	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	The Education Logistics, Inc. (Edulog) pricing model is line item discounts applied to the products and services in the submitted Edulog pricing catalog, which includes detailed pricing data (including standard or MSRP list pricing and the overall Sourcwell discounted amount). These Edulog pricing materials have been submitted in the document upload section of our response. Edulog recognizes and understands that, in addition to the standard discount we will provide to Sourcwell participants, Participating Entities may request adjustments to pricing directly from Edulog during the negotiation and execution of any transaction.	*
63	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	For participating entities, the pricing discount is twelve (12) percent "across the board" for all Education Logistics, Inc. (Edulog) products and services contained in our submitted pricing catalog.	*
64	Describe any quantity or volume discounts or rebate programs that you offer.	Quantity or volume discounts (or rebates) would be handled according to this pricing clause in the Sourcwell MASTER AGREEMENT #102924: "Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction."	*

65	Propose a method of facilitating “sourced” products or related services, which may be referred to as “open market” items or “non-contracted items”. For example, you may supply such items “at cost” or “at cost plus a percentage,” or you may supply a quote for each such request.	<p>To effectively facilitate “sourced” or “open market” products and services which are not included in the Education Logistics, Inc. (Edulog) current pricing catalog, Edulog can adopt several pricing and fulfillment strategies that balance transparency, value, and responsiveness to client needs:</p> <p>1. Cost-Plus Pricing Model</p> <ul style="list-style-type: none"> <li>o At Cost Plus a Percentage: Edulog could offer open market items at cost plus a fixed percentage markup (e.g., 5-10%). This approach provides transparency, ensuring clients are aware of the base cost and the added percentage, which covers administrative and handling expenses. A standardized markup percentage can streamline quoting and procurement, especially for frequently requested items.</li> </ul> <p>Quote-Based Fulfillment Model</p> <ul style="list-style-type: none"> <li>o Quote for Each Request: Edulog could generate individual quotes for open market items based on the specific request, allowing for flexibility in pricing and customization based on the item’s availability, vendor costs, and any discounts. This approach is ideal for unique or less frequently sourced items and ensures clients receive the most accurate pricing without standardized markups.</li> </ul> <p>Each of these models can cater to different client needs, allowing Edulog to offer competitive, transparent, and flexible options for open market products and services while ensuring that clients have clear, manageable procurement options.</p>
66	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	<p>There are two major elements of the total cost of acquisition that are not included in the pricing submitted with the Education Logistics, Inc. response. They are: shipping and handling costs; and travel and lodging expenses. Because of price volatility and our attempts to secure the best possible rates for our customers, shipping costs are not included in any pricing reflected in our pricing catalog. Shipping fees will be invoiced separately once items are shipped.</p> <p>For travel and lodging expenses associated with on-site services (training, consulting, on-vehicle hardware installation, etc.) our policy is:</p> <p>“Unless otherwise specified in an Order Form, all travel, accommodation and out-of-pocket expenses incurred by EDULOG in connection with the provision of Products and/or Services (including installation, implementation, training, maintenance) shall be paid by Customer. Expenses for meals will be charged at a rate not to exceed Federal Travel Regulations (FTA) Sec. 301. If Customer’s staff travels to Montana for training, all travel and lodging expenses will be the responsibility of the Customer.”</p>

67	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	<p>The Education Logistics, Inc. (Edulog) freight, shipping, and delivery program is designed to ensure efficient, cost-effective transportation of goods to participating entities. This includes managing logistics, ensuring timely delivery, and maintaining communication with stakeholders.</p> <p>Freight and Shipping Options</p> <ul style="list-style-type: none"> <li>• Modes of Transportation: <ul style="list-style-type: none"> <li>o Ground Freight: Suitable for short to medium distances. Typically includes trucks or vans.</li> <li>o Air Freight: Ideal for urgent deliveries over long distances. This mode is more expensive but ensures speed.</li> </ul> </li> <li>• Shipping Partners: Edulog will collaborate with reputable carriers and freight forwarders who offer competitive rates and reliable services.</li> </ul> <p>Cost Structure</p> <ul style="list-style-type: none"> <li>• Base Rates: Edulog will determine clear base rates based on the mode of transportation, distance, and weight/volume of goods.</li> <li>• Additional Charges: <ul style="list-style-type: none"> <li>o Fuel surcharges</li> <li>o Liftgate service fees</li> <li>o Over-dimensional or overweight fees</li> <li>o Customs duties for international shipments</li> </ul> </li> </ul> <p>Delivery Process</p> <ul style="list-style-type: none"> <li>• Order Processing: Once an order is placed, Edulog's team will confirm inventory and shipping details.</li> <li>• Scheduling: Edulog will coordinate with the shipping partner to schedule pick-up and delivery times, considering the participating entity's operational hours.</li> <li>• Tracking: Edulog will provide real-time tracking information to the participating entity, allowing them to monitor their shipment.</li> </ul> <p>Packaging and Handling</p> <ul style="list-style-type: none"> <li>• Standards: Edulog will use industry-standard packaging to prevent damage during transit. This includes using appropriate materials for fragile items.</li> <li>• Labeling: Edulog will ensure that all packages are labeled correctly with the destination address, handling instructions, and tracking information.</li> </ul> <p>Delivery Notification</p> <ul style="list-style-type: none"> <li>• Communication: The shipper chosen by Edulog will notify the participating entity about the shipment's status, including expected delivery dates and any delays.</li> </ul> <p>Repair and Replacement of Hardware.</p> <p>In the event the Hardware requires repairs or replacement during the Term of the Agreement, Customer shall promptly notify EDULOG in writing of such request. If Customer has purchased an EDULOG Warranty and EDULOG determines that the requested repairs or replacement is covered by the EDULOG Warranty, EDULOG will provide such repairs or replacement in accordance with the terms of the EDULOG Warranty. If the Hardware is not covered by the EDULOG Warranty, EDULOG may, in its sole discretion, repair or replace the Hardware at Customer's cost. Customer will pay shipping costs to get impacted hardware to Edulog. Edulog will pay shipping costs to return hardware to Customer.</p>
68	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	<p>The Education Logistics, Inc. (Edulog) freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery are the same as described above, except the shipping method may be provided by an ocean-going vessel.</p>



69	Describe any unique distribution and/or delivery methods or options offered in your proposal.	<p>Because the Education Logistics, Inc. (Edulog) Athena is a cloud-based system using AWS (Amazon Web Services)—delivery of the software system is fast, efficient, and effectively “hands off” for the customer. The benefits of an Edulog AWS-hosted system include: there will be no need for district IT support of either software or server hardware; the software will always be up-to-date with latest version without any involvement from the district; and the district will have no obligation for data and system operations involving new release installations, backups, system patching, etc. Another advantage of AWS hosting is that electrical outage or a disaster (fire, hurricane, lightning strike, flood) at the district’s IT facility will not bring down the system.</p> <p>With an AWS-hosted Edulog system, the client school district would have full access to its data just as it would with a district-hosted system, and AWS data security is recognized for its superiority at storage and transmission of even the most sensitive information.</p>
70	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcwell. This process includes ensuring that Sourcwell participating entities obtain the proper pricing.	<p>Education Logistics, Inc. (Edulog) will implement a comprehensive self-audit process to ensure compliance with the proposed agreement with Sourcwell, focusing on verifying proper pricing and adherence to contractual obligations. Edulog has considerable experience self-auditing contracts with other purchasing cooperatives.</p> <p><b>Self-Audit Process Overview</b> The self-audit program will be designed to systematically assess Edulog’s compliance with the Sourcwell agreement. This includes regular reviews of pricing, service delivery, and overall contract adherence.</p> <p><b>Audit Team Formation</b></p> <ul style="list-style-type: none"> <li>• <b>Composition:</b> A dedicated audit team will be formed, comprising representatives from various departments such as finance, operations, compliance, and customer service.</li> <li>• <b>Training:</b> Team members will receive training on the Sourcwell agreement terms, pricing structures, and compliance requirements.</li> </ul> <p><b>Audit Schedule</b></p> <ul style="list-style-type: none"> <li>• <b>Frequency:</b> Audits will be conducted quarterly to ensure ongoing compliance and timely identification of any discrepancies.</li> <li>• <b>Planning:</b> The audit schedule will be planned at the beginning of each fiscal year, allowing for adjustments based on operational needs.</li> </ul> <p><b>Documentation Review</b></p> <ul style="list-style-type: none"> <li>• <b>Contractual Documentation:</b> The audit team will review the Sourcwell agreement, including pricing schedules and terms of service.</li> <li>• <b>Transaction Records:</b> Examination of transaction records to verify that all pricing aligns with the agreed-upon rates. This includes comparing invoices against contract pricing.</li> </ul> <p><b>Pricing Verification Process</b></p> <ul style="list-style-type: none"> <li>• <b>Price Comparison:</b> The audit team will compare actual charges with the contracted rates to identify any discrepancies. This will include checks for: <ul style="list-style-type: none"> <li>o Discounts</li> <li>o Additional fees (if applicable)</li> <li>o Any promotional pricing or special agreements</li> </ul> </li> </ul> <p><b>Compliance Checks</b></p> <ul style="list-style-type: none"> <li>• <b>Implementation Plans:</b> Verification that the services provided meet the established workplans, including delivery timelines and service quality.</li> <li>• <b>Feedback Mechanism:</b> Collecting feedback from Sourcwell participating entities regarding pricing accuracy and service delivery to assess overall satisfaction.</li> </ul> <p><b>Reporting Findings</b></p> <ul style="list-style-type: none"> <li>• <b>Audit Reports:</b> After each audit, a detailed report will be generated summarizing findings, including any discrepancies, compliance issues, and areas for improvement.</li> <li>• <b>Management Review:</b> The audit report will be presented to Edulog’s management team for review and action.</li> </ul> <p><b>Corrective Actions</b></p> <ul style="list-style-type: none"> <li>• <b>Action Plans:</b> If discrepancies are identified, the audit team will develop corrective action plans to address the issues, ensuring that</li> </ul>

proper pricing is implemented moving forward.

- Follow-Up Audits: Follow-up audits will be conducted to verify that corrective actions have been successfully implemented.

Continuous Improvement

- Process Evaluation: The self-audit process itself will be evaluated regularly to identify opportunities for improvement in compliance verification and pricing accuracy.
- Training and Development: Based on audit findings, additional training will be provided to staff to reinforce compliance with pricing structures and contract terms.

Stakeholder Communication

- Regular Updates: Edulog will maintain open lines of communication with Sourcewell and participating entities regarding audit outcomes and any actions taken to resolve issues.
- Transparency: A commitment to transparency will be made by sharing relevant audit findings and updates on compliance measures with Sourcewell.

By implementing this self-audit process, Edulog will ensure compliance with the Sourcewell agreement, verify that participating entities receive proper pricing, and maintain high standards of service delivery. This proactive approach will enhance trust and accountability between Edulog, Sourcewell, and participating entities.

71	<p>If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.</p>	<p>If Education Logistics, Inc. Edulog is awarded a Sourcewell agreement, tracking internal metrics will be essential to measure success and ensure compliance with the terms of the agreement. Here are several key metrics that Edulog might monitor:</p> <p><b>Sales Growth Metrics</b></p> <ul style="list-style-type: none"> <li>Revenue from Sourcewell Participating Entities: Measure the total revenue generated from Sourcewell participants over specific periods (monthly, quarterly, annually) to assess financial performance.</li> <li>New Accounts Acquired: Track the number of new Sourcewell participating entities that have become Edulog customers under the agreement, reflecting the effectiveness of outreach and marketing efforts.</li> </ul> <p><b>Customer Satisfaction and Retention</b></p> <ul style="list-style-type: none"> <li>Customer Satisfaction Score (CSAT): Conduct surveys to assess the satisfaction levels of participating entities regarding pricing, service quality, and overall experience.</li> <li>Net Promoter Score (NPS): Measure the likelihood of Sourcewell participants recommending Edulog to others, indicating overall satisfaction and loyalty.</li> <li>Customer Retention Rate: Track the percentage of Sourcewell participating entities that continue to engage with Edulog over time. High retention rates suggest successful relationship management.</li> </ul> <p><b>Service Level Agreement (SLA) Compliance</b></p> <ul style="list-style-type: none"> <li>SLA Adherence Rate: Monitor the percentage of SLAs met (e.g., response times, resolution times) for services provided to Sourcewell participants. This metric ensures that Edulog is fulfilling its contractual obligations.</li> <li>Issue Resolution Time: Measure the average time taken to resolve issues or inquiries from Sourcewell participants, aiming for quick resolutions to enhance customer experience.</li> </ul> <p><b>Engagement and Communication Metrics</b></p> <ul style="list-style-type: none"> <li>Frequency of Communication: Track the frequency and types of communication with Sourcewell participating entities (e.g., newsletters, updates, feedback requests). Consistent engagement helps maintain strong relationships.</li> <li>Feedback Response Rate: Measure the percentage of feedback received from participating entities that is acknowledged and acted upon, reflecting Edulog's commitment to continuous improvement.</li> </ul> <p><b>Financial Metrics</b></p> <ul style="list-style-type: none"> <li>Cost of Goods Sold (COGS): Track COGS related to fulfilling the Sourcewell agreement to ensure profitability.</li> <li>Return on Investment (ROI): Calculate the ROI for marketing and operational initiatives related to the Sourcewell agreement to determine their effectiveness and impact on overall performance.</li> </ul> <p>By tracking these metrics, Edulog can gain valuable insights into the success of the Sourcewell agreement, identify areas for improvement, and ensure a strong partnership with Sourcewell and its participating entities.</p>	*
72	<p>Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The proposed Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.</p>	<p>The administrative fee referenced in this Section shall be calculated as a percentage of Net Sales (defined below) as follows: Unless otherwise mutually agreed to in writing by Sourcewell and Education Logistics, Inc. ("Edulog"), and except as stated below, Edulog will pay Sourcewell an administrative fee of two percent (2.0%) of the Members' aggregate Net Sales during each calendar quarter, which have been timely paid, to be paid within forty-five (45) days after the end of each calendar quarter.</p> <p><b>Net Sales:</b> Net Sales will be defined as the gross sales price of the applicable products sold pursuant to this Contract, less shipping costs (including freight charges and insurance), taxes, duties, travel and lodging expenses, and rejections and returns to the extent credit is given or paid.</p> <p>Edulog agrees to cooperate with Sourcewell in auditing transactions under this Contract to ensure that the administrative fee is paid on all items purchased under this Contract.</p>	*

**Table 7: Pricing Offered**

Line Item	The Pricing Offered in this Proposal is: *	Comments
73	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Please refer to the submitted Education Logistics, Inc. (Eduog) pricing catalog. For participating entities, the pricing discount is twelve (12) percent "across the board" for all Education Logistics, Inc. (Edulog) products and services contained in our submitted pricing catalog.

**Table 8A: Depth and Breadth of Offered Solutions (200 Points)**

Line Item	Question	Response *
74	Provide a detailed description of all the Solutions offered, including used, offered in the proposal.	<p>Also please refer to the document attached entitled "Description of Edulog Products and Services (Sourcewell)."</p> <p>Since 1978, Edulog (Education Logistics, Inc.) has been the most trusted and respected name in student transportation management systems for large school districts. Many of the biggest school transportation operators in North America rely on our software every day with full confidence in Edulog's:</p> <ul style="list-style-type: none"> <li>o fully integrated superior optimization that produces road-ready results;</li> <li>o full integration of routing functions with GPS;</li> <li>o on-board tablet, and passenger ID systems;</li> <li>o accurate and reliable parental notifications;</li> <li>o different day, different destination scheduling;</li> <li>o easy-to-use long range planning tools to test "what if" scenarios; ability to effectively manage vehicles/drivers from multiple depots and/or contractors;</li> <li>o and reliable automated data transfers with third-party systems for student information (SIS), fleet maintenance, payroll, and timekeeping.</li> </ul> <p>Edulog continues its tradition of innovation with the release of Athena, Edulog's revolutionary next generation school transportation management system. Athena is a cloud-based solution designed specifically for the complex operations of large school districts, and it is the most flexible and powerful system ever produced for K-12 transportation management and planning. Compared to Edulog's Athena system, no other solution on the market can transportation departments with the quality of data needed to meet today's transparency demands. We believe that the participating entities will greatly benefit from an Edulog demonstration/presentation of the products and services it can provide to meet the challenges of: optimizing for greater efficiency, communicating bus information to parents and schools—and creating a new transportation plan to accommodate changing circumstances. There is absolutely no other vendor that can match the experience or capabilities of Edulog in meeting today's student transportation challenges.</p> <p>In order to create this incredible system, Edulog returned to the drawing board, rebuilding its entire system from the ground up. Designing a new system from scratch is not an easy task, and that's why no one other than Edulog has done so. It has been clear for years now that large school district transportation operations are no longer required only to transport students to school safely and effectively. As school district operations generally become more sophisticated and integrated and more public-facing, so must transportation. Being able to do a job on the one hand, and being able to plan, work with stakeholders, report out, and be accountable on the other require very different skills and tools. For example, a district can have completely mastered getting a student to and from school more or less on time, but still struggle with the task of communicating timely and accurate information about that student's transportation and how it compares to plan.</p> <p>So, how has Edulog been able to accomplish what no other company can? First, Edulog's engineering staff has extensive experience in the fields of defense, medicine, and applied research (all domains with research and development teams and budgets dwarfing anything available to the entire school transportation industry). This experience with Big Data, AI, machine learning, and related technical fields has been instrumental in developing the Athena framework and the incorporation of new software techniques and designs inherently impossible to graft on to legacy systems.</p>

Next, Edulog has been engaged in student transportation projects beyond North America; places where school busing is a new concept and the mentality of “this is how things have always been done” doesn’t exist. What we’ve learned from this experience—and have incorporated into the fundamentals of Athena—is that a truly modern student transportation management system needs to incorporate more than just routing and scheduling. Not only does the system need to accept, process, and communicate information from a variety of devices (mobile phones, tablets, GPS, student ID systems), it also must be responsive and inclusive to all stakeholders and users—parents especially, but also data analysts, school administrators and teachers, bus drivers and aides, and of course transportation department and busing vendor routers/dispatchers/planners.

None of this is possible without effective and intelligent data modeling—again, something that cannot be “added on” to legacy systems. Because Athena has been designed from scratch, Edulog has brought its 40+ years of experience and reflection in school transportation to the development of models using business intelligence that truly solve the most difficult problems in the domain: user permission management, scheduling frequency, effective dates, integration of optimization, multi-dimensional display of large amount of data, substitutions, etc.

#### A GAME-CHANGING SOLUTION

With Edulog Athena, you can plan and manage all daily and long-term busing activities with intuitive, easy-to-use workspaces customized for each user and role. Athena gives you the tools to quickly and correctly act upon changing circumstances and know with certainty what buses are doing at all times. Athena gives you solutions that make routing simple.

- o Integration - Athena integrates with many third-party systems, such as all major student information systems (including PowerSchool), pulling and populating your transportation rosters, eligibility, and more based on your district’s daily records; most AVL/GPS systems (including both Zonar and Samsara); etc.

- o Efficient User Interface – It’s easy to select and assign multiple students to stops, quickly assign stops to runs, and do it all right from the map. Performing your most common routing tasks is fast, easy, and intuitive.

- o Better, Faster, Stronger – Enhanced management processes for mapping, automated student scheduling, routing optimization available as a routine routing operation, bus substitutions in GPS tracking, etc.

Athena is the most cutting-edge and capable system ever produced for K-12 transportation management and planning. Athena offers everything that you need for safe, efficient, economical student transportation management, without the need to open separate applications or use non-integrated software from two or more vendors. It is all backed by more than 40 years of experience and the innovation that only Edulog can provide. Everything you need is in one place from the most experienced and knowledgeable vendor in the industry. Unlike other companies, we only do K-12 transportation management. Students are not packages out for delivery, and everything we do is focused on the safe and efficient busing of children.

- o GPS/AVL Data in Routing – Compare what actually happens on the road to your plan.

- o Transportation Requests – An Athena exclusive is a smartphone app parents can use to request new or different transportation plans. The system streamlines request processing (managing by exception in many instances), manages student itineraries, and quickly generates bus passes and parent messages.

- o What-If Scenarios – Stay prepared by creating and testing alternate plans in a sandbox environment that seamlessly converts into your operational routing plan when you’re ready.

- o Instant Results – Visualize the impact of small changes and optimize on the go.

We look forward to demonstrating during a presentation how superior our solution is compared to all other systems with the following:

- o Why it is so crucial for school districts to work with a vendor who has on staff former school district transportation directors (something other vendors cannot claim) with considerable experience implementing, maintaining, and using a school transportation management system, and why Edulog is not only the safest choice, it is the only choice.

- o How Edulog brings live GPS data into route management and planning—which is absolutely necessary for creating accurate and meaningful KPIs such as on-time arrival performance and driver/contractor compliance.

- o The advantages/benefits of Edulog’s Parent Portal with capabilities not found in any other system has (transportation requests, ride registration, automatic change notification)

- o How Athena sandboxes make it as easy as possible to simulate routing changes and optimize without affecting current data/plans.

- o The superiority of Athena’s calendaring for not just students, but also bus runs, bus routes, drivers, vehicles, individual schools, aggregated schools, etc.—and how

Athena's Effective Dates function is the only way to automate future route planning.

A great advantage of the Edulog approach to working with districts to meet their transportation needs, especially large complex districts, is that we know that optimization is best when it is an option that can be exercised with as little disruption as possible. Choosing Edulog is choosing a solution that grows and adapts with an organization's readiness for change and continuous improvement.

We encounter many clients whose experience with capital-O "Optimization" is traumatic. This is because until now, with the introduction of Edulog's Athena platform, "Optimization" usually meant a standalone optimization. Standalone optimizations—optimizations performed without the benefit of continuous and ongoing client-level access to the underlying transportation data—are like heart surgery. A standalone optimization is suitable for severe and acute situations and the pros often outweigh the cons. But standalone optimizations are traumatic operations which can cause damage requiring an extended recovery period—and sometimes, depending on the patient's other circumstances, the benefit of the operation is never realized because of the damage done from the operation itself.

Successful optimization requires tight integration with local knowledge and district policies, driver and community acceptance, and an iterative approach. While it is possible to achieve a successful standalone optimization, to do so requires extensive NON-technical work from many stakeholders to prepare the ground with communications initiatives and coordination with driver groups, plus knowing that a technical optimization must always be fine-tuned to take into account the real conditions on the road.

With the Athena platform, Edulog has made optimization accessible in a meaningful and integrated, non-traumatic way to our clients who are ready for optimization. Instead of performing the heart surgery-level project once every several years, our Athena platform is the equivalent of adding a few hundred steps every day to your activity level—small consistent changes whose benefits add up over time and result in overall better system health without the need for a major, acute intervention.

How do we do it? By integrating optimization as an available tool to use at almost every level of a transportation management system, including:

- o Student to stop assignments
- o Stop sequencing along a run
- o Special transportation needs (available vehicles, equipment needs, stop characteristics)
- o Routes, which are the combination of all the runs served by one bus (including the ability to suggest the best depots and yards)
- o School bell times (including arrival/departure time windows)

Whether, and how, to use Athena's optimization capabilities at all, and at which level is completely optional; the Edulog tools are present but need not be used. Even if used, the tool's output is simply another piece of data for a knowledgeable decision maker to consider, much like a calculator and/or looking something up on Google. But an important part of why this makes Edulog—and optimization in Edulog—different is that optimization needs to be an iterative process. It's hard and expensive to have optimization be an iterative process if optimization is a standalone project, performed by an outside team. But Edulog Athena keeps optimization tools at your fingertips, backed by a team of knowledgeable and experienced staff members who can offer elevated assistance if necessary.

#### BRIEF DESCRIPTION OF OFFERINGS

Edulog (Education Logistics, Inc.) offers a comprehensive suite of solutions designed to optimize school transportation operations and enhance safety, efficiency, and communication for school districts.

#### Routing and Planning Software

- Overview: Edulog's routing and planning software is a core solution designed to help school districts efficiently plan and optimize bus routes.
- Features:
  - o Automated Route Optimization: Uses advanced algorithms to create efficient routes, considering factors like student location, distance, traffic, and safety.
  - o What-If Scenario Planning: Allows districts to model different scenarios (e.g., school boundary changes, bus shortages) to see impacts before implementing changes.
  - o GIS Mapping: Integrates with GIS to provide precise, location-based data for better route accuracy.
  - o Reporting and Analytics: Generates reports on route efficiency, costs, and more, helping administrators make data-driven decisions.
- Benefits: Reduces transportation costs, enhances student safety, and simplifies route planning for district administrators.



#### Parent Portal and App

- Overview: A mobile app that keeps parents informed about their child's bus schedule, estimated arrival times, and route changes.
- Features:
  - o Real-Time Tracking: Allows parents to view the bus's current location in real-time.
  - o Push Notifications: Sends alerts on delays, route changes, or emergencies.
  - o Daily Schedule Updates: Shows daily pick-up and drop-off times, enabling parents to plan accordingly.
- Benefits: Improves communication with parents, enhances student safety, and reduces calls to the district for bus updates.

#### GPS Tracking and Telematics

- Overview: GPS tracking solution for school buses that provides real-time data on bus location and performance.
- Features:
  - o Real-Time Bus Tracking: Displays bus locations on a digital map.
  - o Telematics Data: Provides insights into driver behavior, fuel usage, and vehicle health.
  - o Geofencing: Creates virtual boundaries around specific areas, sending alerts if buses deviate from their routes.
- Benefits: Enhances route compliance, improves bus utilization, and supports fleet management through better vehicle maintenance insights.

#### Edulog On-Vehicle Tablet System

##### Overview

The on-vehicle tablet system is designed to simplify drivers' daily tasks, improve route accuracy, and provide real-time information. Installed directly on each bus, the tablet integrates with Edulog's routing, GPS, and tracking software, enabling seamless interaction between drivers, dispatch, and transportation administrators.

##### Features

##### Route Navigation and Guidance

- o Turn-by-Turn Directions: Provides drivers with step-by-step instructions, reducing missed stops and helping substitute drivers stay on course.
- o Quick Adjustments: Allows dispatch to make route updates in response to traffic, road closures, or emergencies, with updates visible on the tablet.

##### Student Ridership Recording/Reporting

- o Real-Time Updates for Parents and Staff: The tablet tracks student boarding and de-boarding events, which is relayed to the parent app and administrative portals, enhancing visibility and peace of mind for parents.
- o Daily Attendance Records: Provides a record of each student's travel, allowing for easy verification of attendance and adherence to designated pick-up and drop-off points.

##### Driver Time and Attendance

- o Automated Clock-In/Clock-Out: The tablet allows drivers to log their work hours, reducing the need for paper timesheets and enabling more accurate payroll processing.
- o Break and Leave Tracking: Helps drivers manage break times, ensuring compliance with labor regulations and reducing administrative work.

##### Safety and Incident Reporting

- o Emergency Notifications: Drivers can quickly send emergency alerts to dispatch in case of an accident, breakdown, or safety issue, with the tablet transmitting location data to streamline emergency response.
- o Safety Checklist: Provides a pre-trip and post-trip checklist that drivers can complete on the tablet, ensuring vehicle safety and compliance with regulations.

##### Communication with Dispatch

- o Two-Way Messaging: Allows drivers to communicate with dispatch in real time via text-based messaging, ensuring they receive important updates or instructions.
- o Route Updates and Notifications: Dispatch can send real-time route changes, detours, or other alerts directly to the tablet, keeping drivers informed.

##### Vehicle and Driver Performance Monitoring

- o Telematics Integration: Tracks driver behavior such as idling, speeding, and harsh braking, providing data to support safer driving practices and fuel efficiency.
- o Route Performance Tracking: Monitors on-time performance, route adherence, and stop compliance to identify and improve operational efficiency.

##### Benefits

##### Enhanced Safety

- o Real-time student tracking ensures that students are on the correct bus and reach the right destination.
- o The emergency notification and safety checklist features help drivers manage critical situations effectively and ensure the bus is safe before starting routes.

#### Improved Efficiency and Compliance

- o Route guidance reduces missed stops and late arrivals, supporting timely and compliant route completion.
- o Automated time tracking and digital safety checklists reduce paperwork, enabling faster payroll processing and better regulatory compliance.

#### Better Communication

- o The two-way communication feature keeps drivers connected with dispatch, ensuring they can quickly receive and respond to important updates or emergencies.
- o Parents and school administrators benefit from real-time data on bus and student locations, reducing uncertainty and improving communication with families.

#### Operational Cost Savings

- o Route optimization and driver behavior monitoring help reduce fuel costs by identifying and correcting inefficient driving practices.
- o Automated record-keeping for time, attendance, and ridership reduces administrative workload and errors, saving time and resources.

#### Higher Parent and Student Satisfaction

- o Parents can track their child's bus location and estimated arrival times, easing concerns and allowing for better daily planning.
- o Enhanced driver support with route guidance and real-time assistance reduces errors, providing students with a safer and more reliable transportation experience.

Edulog's on-vehicle tablet system supports a streamlined, safe, and transparent school transportation operation, improving service quality and efficiency for districts, parents, and students alike.

#### Driver Time and Attendance

- Overview: A solution for tracking driver work hours, absences, and time spent on each route.
- Features:
  - o Automated Time Capture: Logs driver time upon starting and completing routes, reducing manual timesheet entry.
  - o Leave and Absence Tracking: Monitors driver absences and allows administrators to manage substitute drivers as needed.
  - o Payroll Integration: Integrates with payroll systems for seamless processing of driver pay.
- Benefits: Improves driver attendance tracking, supports compliance with labor regulations, and reduces payroll errors.

#### Student Ridership Management

- Overview: Provides real-time recording and reporting of students getting on and off the bus to improve student safety and accountability.
- Features:
  - o RFID Scanning: Students scan a card upon boarding and exiting, recording each ride.
  - o Real-Time Data for Parents and Administrators: Shows when and where students boarded and exited the bus.
  - o Attendance and Reporting: Tracks ridership trends and provides reports to help optimize routes.
- Benefits: Enhances student safety, supports accurate record-keeping, and helps districts manage student transportation effectively.

#### Field Trip Management

- Overview: An online platform for managing field trip requests, approvals, and scheduling.
- Features:
  - o Digital Request System: Allows teachers and staff to submit field trip requests for review and approval.
  - o Vehicle and Driver Scheduling: Manages bus and driver assignments based on availability and trip needs.
  - o Cost Tracking: Tracks expenses related to field trips, including driver pay and fuel usage.
- Benefits: Streamlines the field trip planning process, reduces paperwork, and optimizes resource allocation for field trips.

#### Edulog Analytics and Reporting

- Overview: A powerful tool that aggregates transportation data to provide insights into efficiency, costs, and performance.
- Features:
  - o Key Performance Indicator (KPI) Tracking: Tracks metrics such as cost per mile, fuel efficiency, and on-time performance.
  - o Customizable Reports: Allows districts to create custom reports for budgeting, compliance, and performance review.
- Benefits: Enables data-driven decision-making, improves transparency, and helps

		<p>districts identify opportunities for cost savings.</p> <p>Safety and Incident Management</p> <ul style="list-style-type: none"> <li>• Overview: A platform to log, track, and manage safety incidents related to school transportation.</li> <li>• Features: <ul style="list-style-type: none"> <li>o Incident Reporting: Allows drivers to report accidents, injuries, or misconduct in real-time.</li> <li>o Documentation and Follow-Up: Supports attaching photos, reports, and other documentation to incidents for thorough records.</li> <li>o Risk Assessment and Compliance: Monitors trends in incidents, helping districts address safety concerns proactively.</li> </ul> </li> <li>• Benefits: Increases transparency in incident management, promotes student and driver safety, and helps ensure compliance with safety protocols.</li> </ul> <p>Fleet Maintenance Management</p> <ul style="list-style-type: none"> <li>• Overview: A maintenance tracking system for scheduling and managing bus repairs, inspections, and upkeep.</li> <li>• Features: <ul style="list-style-type: none"> <li>o Work Order Management: Schedules and tracks maintenance tasks, generating work orders as needed.</li> <li>o Preventive Maintenance Scheduling: Automates scheduling of routine maintenance to prevent breakdowns.</li> <li>o Inventory and Cost Tracking: Monitors parts inventory and tracks repair costs for budget management.</li> </ul> </li> <li>• Benefits: Extends vehicle lifespan, reduces unplanned downtime, and helps control maintenance costs.</li> </ul> <p>Customizable Alerts and Notifications</p> <ul style="list-style-type: none"> <li>• Overview: A customizable communication platform that can send alerts and notifications to parents, drivers, and administrators.</li> <li>• Features: <ul style="list-style-type: none"> <li>o Automated Alerts: Notifies parents of delays, route changes, or emergencies via email or SMS.</li> <li>o Driver and Staff Notifications: Keeps drivers informed of schedule changes, cancellations, or safety updates.</li> <li>o Administrator Communication: Supports automated reporting and alerts to keep administrators informed of key metrics and incidents.</li> </ul> </li> <li>• Benefits: Improves communication between district stakeholders, reduces confusion in transportation operations, and enhances responsiveness in emergencies.</li> </ul> <p>Integrated Data Services</p> <ul style="list-style-type: none"> <li>• Overview: Data integration services to connect Edulog software with district systems like student information systems (SIS), HR systems, and finance platforms.</li> <li>• Features: <ul style="list-style-type: none"> <li>o SIS Integration: Synchronizes student information for up-to-date ridership data.</li> <li>o HR and Payroll Integration: Streamlines data flow for time tracking and payroll processes.</li> <li>o Custom API Integrations: Provides custom integrations for districts with unique data management needs.</li> </ul> </li> <li>• Benefits: Reduces duplicate data entry, ensures data consistency, and improves workflow efficiency across systems.</li> </ul> <p>Edulog's solutions are designed to create a seamless and efficient transportation management system, improving safety, communication, and operational efficiency for school districts and enhancing the transportation experience for students, parents, and staff.</p>	
75	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Transportation Routing, Planning and Scheduling</p> <p>GPS Tracking and Telematics integrated with Routing and Planning Management</p> <p>Driver Time and Attendance</p> <p>Student Ridership Management</p> <p>Field Trip Management</p> <p>Data Analytics and Reporting</p> <p>Fleet Maintenance Management</p> <p>Integrated Data Services with Third Party Systems</p> <p>On-Vehicle Tablet System</p> <p>Dispatch Management</p> <p>Geofencing</p> <p>School Portal</p> <p>Driver Portal</p> <p>Ride Registration and Transportation Change Requests</p> <p>On-Vehicle Cameras</p>	*

**Table 8B: Depth and Breadth of Offered Solutions**

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments	
76	Fleet management information systems	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, most certainly with the Education Logistics, Inc. (Eduog) Athena suite of products. Please refer to submitted documents for details.	*
77	Fleet technology related hardware solutions	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, most certainly with GPS/AVL telematics, devices, on-vehicle tablets, on-vehicle cameras, and on-vehicle RFID reads.	*
78	Related software solutions	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, including: Transportation Routing, Planning and Scheduling GPS Tracking and Telematics integrated with Routing and Planning Management Driver Time and Attendance Student Ridership Management Field Trip Management Data Analytics and Reporting Fleet Maintenance Management Integrated Data Services with Third Party Systems On-Vehicle Tablet System Dispatch Management School Portal Driver Portal Ride Registration and Transportation Change Requests On-Vehicle Cameras	*
79	Fleet telematics	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with the integrated Edulog Telematics (GPS/AVL) system and our provision of Samsara IoT (Internet of Things) products and services.	*
80	Fleet monitoring and asset tracking	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with the integrated Edulog Telematics (GPS/AVL) system and our provision of Samsara IoT (Internet of Things) products and services.	*
81	Geofencing solutions	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with the integrated Edulog Telematics (GPS/AVL) system and our provision of Samsara IoT (Internet of Things) products and services.	*
82	Motor pool and fleet sharing solutions services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with the integrated Edulog Athena Suite of Transportation Management Systems—including Telematics (GPS/AVL) system and our provision of Samsara IoT (Internet of Things) products and services.	*
83	Integrated video solutions	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with our provision of Samsara IoT (Internet of Things) products and services, which include AI-enhanced camera solutions.	*
84	Emissions, Green House Gas (GHG), or Low Carbon Fuel Standard (LCFS) tracking, reporting, and management	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes, with our provision of Samsara IoT (Internet of Things) products and services.	*

Table 9: Exceptions to Terms, Conditions, or Specifications Form

**Line Item 85. NOTICE:** To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Master Agreement Template provided in the “Bid Documents” section. Proposer must upload the redline in the “Requested Exceptions” upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Master Agreement.

Line Item	Do you have exceptions or modifications to propose?	Acknowledgement *
85		<input type="radio"/> Yes <input checked="" type="radio"/> No

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as “Marketing Plan.”
  - [Pricing](#) - Education Logistics, Inc. (Edulog) Pricing Catalog.pdf - Monday October 28, 2024 16:34:46
  - Financial Strength and Stability (optional)
  - [Marketing Plan/Samples](#) - Marketing Packet 2024 (Edulog) Education Logistics, Inc. Systems and Services.pdf - Monday October 28, 2024 16:35:37
  - [WMBE/MBE/SBE or Related Certificates](#) - NMMSDC Minority Business Certification 2023-2025 MWBE Certificate--Education Logistics, Inc..pdf - Monday October 28, 2024 16:37:38
  - [Standard Transaction Document Samples](#) - Education Logistics, Inc. (Edulog) Sample Order Form for Sourcewell RFP.pdf - Monday October 28, 2024 16:55:54
  - Requested Exceptions (optional)
  - [Upload Additional Document](#) - Description of Edulog Products and Services (Sourcewell).pdf - Monday October 28, 2024 16:45:02

## Addenda, Terms and Conditions

### PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
  - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
    - (i) Those prices;
    - (ii) The intention to submit an offer; or
    - (iii) The methods or factors used to calculate the prices offered.
  - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
  - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
  1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
  2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
  3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

☒ By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Jason Corbally, President, Education Logistics, Inc.



The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

☒ Yes    ☐ No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
<b>Addendum_12_RFP_102924_Fleet Management_Technology</b> Tue October 22 2024 07:02 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_11_RFP_102924_Fleet Management_Technology</b> Fri October 18 2024 03:16 PM	<input checked="" type="checkbox"/>	2
<b>Addendum_10_RFP_102924_Fleet Management_Technology</b> Thu October 17 2024 01:06 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_9_RFP_102924_Fleet Management_Technology</b> Thu October 10 2024 02:44 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_8_RFP_102924_Fleet Management_Technology</b> Wed October 9 2024 03:28 PM	<input checked="" type="checkbox"/>	2
<b>Addendum_7_RFP_102924_Fleet Management_Technology</b> Tue October 8 2024 02:23 PM	<input checked="" type="checkbox"/>	2
<b>Addendum_6_RFP_102924_Fleet Management_Technology</b> Fri October 4 2024 08:10 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_5_RFP_102924_Fleet Management_Technology</b> Mon September 30 2024 04:19 PM	<input checked="" type="checkbox"/>	3
<b>Addendum_4_RFP_102924_Fleet Management_Technology</b> Wed September 25 2024 08:19 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_3_RFP_102924_Fleet Management_Technology</b> Tue September 24 2024 08:22 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_2_RFP_102924_Fleet Management_Technology</b> Wed September 18 2024 09:24 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_1_RFP_102924_Fleet Management_Technology</b> Fri September 13 2024 04:33 PM	<input checked="" type="checkbox"/>	1